TRADE AND INDUSTRY

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Switzerland: a changed relationship but business as usual

Consumer boom in Japan—and hard selling at Tokyo's London Fashion Show

Community transit—documentation of Anglo-Danish trade goods

UK trade by air in the first half of 1973

BOTB Programme of Trade Promotions 1973-1975

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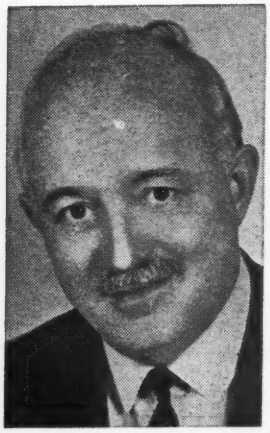
Switzerland: The relationship changes, but business goes on as usual

by P. D. Stobart, MBE, Commercial Counsellor in Switzerland and Liechtenstein



From 1960 to the end of 1972 Britain and Switzerland were closely and formally linked as members of the European Free Trade Association. Together with our other EFTA partners, we abolished tariffs on almost all industrial goods, and have now, for almost a decade, been in a customs-free trading relationship with one another.

During this period, our trade with Switzerland increased very significantly, as the accompanying diagram shows.

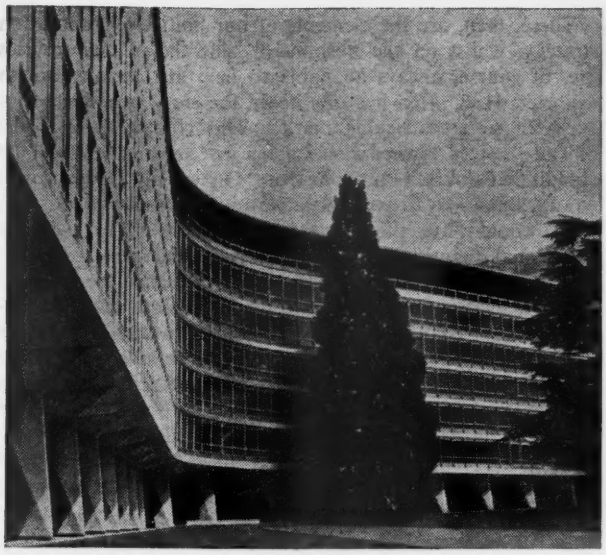
Thus, over a period of 12 years our exports to the Swiss market have increased five-fold.

Even allowing for price inflation during this period, our exports have reached no mean total, and represent an annual per capita consumption of British goods by the Swiss of £48.10 as compared with £10.20 by the French, or £5.90 by the West Germans. The result is the more creditable to our exporters in that, with the exception of such high value goods as can more economically be supplied by air, the British firm has had to face in this central European market the extra cost of a three-mode transport system (land, sea and land, which, even in these days of the vehicle ferry and the container still represents a cost disadvantage) whereas Switzerland's immediate neighbours can enjoy in terms of cost and convenience the advantages of virtual door-to-door delivery by what is, in effect, a common rail and road network. This fact has, as we shall see later, had an obvious effect upon the pattern of our exports, since transport costs inevitably eat into our competitiveness as suppliers of high weight or bulk/low cost items, and forces the British exporter to concentrate upon the more highly developed ranges of products.

If this exceptionally prosperous market is of interest to Britain, it is, and always has been, of interest to our main competitors also. It was therefore in the logic of things that this, the most centrally situated country in Western Europe, should be kept firmly within the European trading family. Switzerland, because of her traditional neutrality, did not feel able to apply for full membership of the EEC but instead, last year, concluded a Free Trade Agreement with the extended EEC (including, of course, the UK) under which, with few exceptions, no tariffs shall be reimposed upon goods already tariff-free, and those tariffs on industrial goods existing between Switzerland and the other members of the EEC, such as her French, German and Italian neighbours, shall be progressively reduced and eventually abolished. This Agreement entered into force on January 1 this year, and the formal relationship which it creates has, as far as Britain is concerned, replaced that previously existing under EFTA. From our point of view, although the institutional framework under which our trade with Switzerland is conducted has changed, business goes on much as before.

A new situation for exporters

One new situation which the British exporter will face is that he will now have to meet greater competition in this market, as the original EEC members begin to lose their



Many Swiss companies operate on an international scale with subsidiaries all over the world. This picture shows the Nestlé headquarters in Vevey.

tariff disadvantages here. The effect of this change, however, should not be overstated. For one thing, the general level of Swiss tariffs has always been traditionally low and therefore our competitors have never been totally inhibited from selling here by the tariff barrier (and particularly their more sophisticated goods, since the Swiss customs tariff operates by weight, not value), and for another, as British industry progressively penetrates the neighbouring EEC markets and acquires expertise in Europe generally; perhaps establishes subsidiaries and engages in market research, a marketing plan for Switzerland, if one does not already exist, becomes both the more necessary and also the easier to achieve.

State of the economy

One factor of great importance when assessing our prospects in a particular market is the state of the local economy. That of Switzerland continues to expand despite official curbs on credit and on building. Along with expansion has come an inflation rate of about 8 per cent. The labour market remains extremely tight and, with continuing political pressures to restrain the entry of foreign workers, is likely to remain so or even become tighter with a consequent pressure on wage rates. Another factor which may ultimately limit economic growth in Switzerland is, surprisingly enough, a growing shortage of electric power. Virtually all sources of hydro-electric power which can be economically tapped are already being exploited, and ecological objections are holding up the construction of nuclear power stations, particularly those which are water cooled, and which thus would present grave difficulties in a country with no seaboard. Despite these potential difficulties, however, and short of some unforeseen factor such as a dramatic decline in world demand, the Swiss market will continue to be a profitable, if highly competitive one for British exporters.

There is another feature of the Swiss market which is of interest to the exporter. Switzerland is a highly cosmopolitan country, which, through the enduring strength of its currency and of a traditionally liberal policy towards imports, has long been accustomed to being courted by the world's exporters and to being in a 'buyer's market' situation. In consumer goods, taste is sophisticated. Thus, if one can satisfy Swiss requirements as regards quality, finish and presentation, one can probably satisfy those of almost any country in Europe.

In this lively market, whose imports cover the whole spectrum of industry, there is a great variety of opportunities for British exporters, and our staffs in Zurich, Basle, Berne and Geneva daily assist British businessmen who come out to sell a very wide range of goods, However, as the result of intensive visiting of local firms by Commercial Officers, consultations with the Department of Trade and Industry and with British industry itself, backed up by the valuable up-to-date experience of product selection gained from the Swiss Trade Drive in 1971, it is possible to point to certain groups of commodities where the chances for the British exporter are particularly good. These include electronic components, where the market is expanding again. Swiss export order books are filling up, which means that the demand for re-exports is also rising, and the continuing acute shortage of labour is opening up exciting perspectives in the automation field where there is more and more demand for any device which will cut down the employment of labour, from automatic door openers to opto-electronic counting devices. A good market for electronic instrumentation continues at a rather steadier level. The chronic labour shortage has likewise forced industry to turn to computers to fill the gap, and the number of computer installations has doubled over the past four years. (Switzerland has the largest per capita number of computers in Europe.) This has not only created considerable spare capacity, but also a shortage of computer personnel, producing a big demand for software services which cannot be met by the firms already in Switzerland. There should, therefore, be good prospects for British modular structured programmes which can be tailored to Swiss market requirements. Again, there are excellent opportunities for British manufacturers of hydraulic and pneumatic parts and components. Switzerland has a sophisticated engineering industry, requiring large quantities of these items which to a great extent are imported and re-exported to many countries in the form of finished machinery and engineering equipment.

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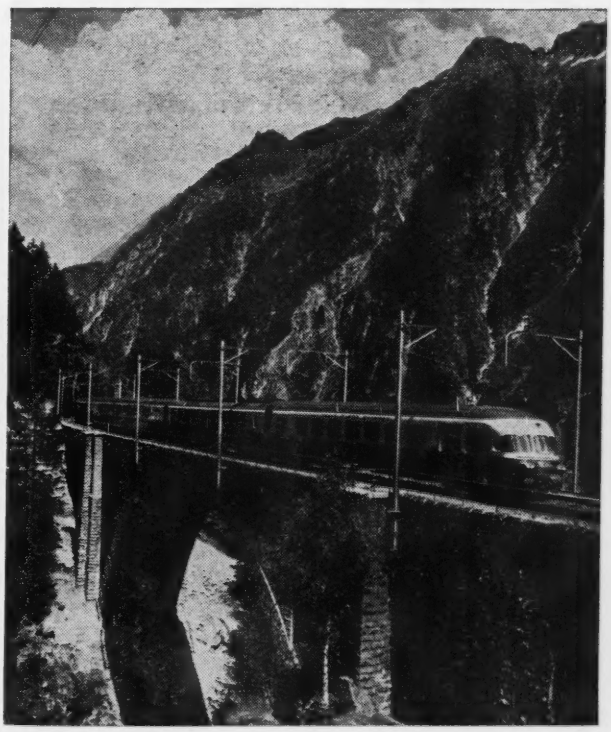

A Trans Europa express climbs towards the St. Gotthard. The opening of this tunnel in 1882 began an era of construction of rail and road links through the Alps which place Switzerland in a key position in Europe's transport system.

SWITZERLAND—BUSINESS AS USUAL
continued

On the consumer goods side there is little doubt that exports of all types of British-made footwear could be increased in spite of the considerable competition here; the domestic footwear manufacturing industry is experiencing difficulties because of rising costs of material and wages.

On a per capita basis, Switzerland is the largest purchaser in Europe of oriental and other knotted carpets, and one of the largest purchasers of machine-made carpets: Britain is her leading supplier of the latter. British prices are at present considered to be very competitive with regard to the medium and better quality tufted carpets, and there is a growing demand for woven wall-to-wall carpets (in continental sizes, of course).

Market for clothing

Finally, clothing, particularly women's and children's wear—Switzerland is our best market in Europe for women's outerwear. Since 1969 the strong influence of London as a fashion centre has declined somewhat but recently fashion has been turning back; the interest in British knitwear has increased considerably and is likely to continue. Provided style, quality and price are right, both high quality and trendy clothes from Britain should continue to have great success. Better colours and styles could also provide openings in the more mature women's medium priced range. Manufacturers of medium priced good quality men's outerwear who adapt their colours, styling and finish to local requirements could also find a profitable market.

These, then, are the elements of our 'initiative' promotion strategy, whilst on the 'responsive' side the official services are, of course, always available to help any serious British exporter. How often has one heard the story of a successful exporter to a particular market who complains that the official services warned him on his first exploration that he couldn't possibly sell his goods there! One can always be proved wrong, and we try to avoid negative advice as much as possible. Who would have thought that Britain would ever export substantial quantities of clocks to Switzerland?

Let me end by emphasising, as I said earlier, that the practical business relationship between United Kingdom and Switzerland has not changed significantly with our accession to the EEC. Switzerland as a market cannot be seen in isolation from its EEC neighbours, and, as far as manufacturing industry is concerned, the inquiries I and my staff have received in the last six months show quite clearly that British exporters who are on the ball well realise that it is logical to include Switzerland in their central European market strategy. As the interest of our manufacturing industries quickens in the EEC markets, so it can be expected to increase in the Swiss markets. It is indeed business as usual with the prospect of even more in the years to come.

ECGD addresses

The Export Credits Guarantee Department's head office is at Aldermanbury House, Aldermanbury, London EC2P 2EL (Tel. 01-606 6699). ECGD has 20 local offices in various parts of the United Kingdom; these are listed from time to time in *Trade and Industry*.

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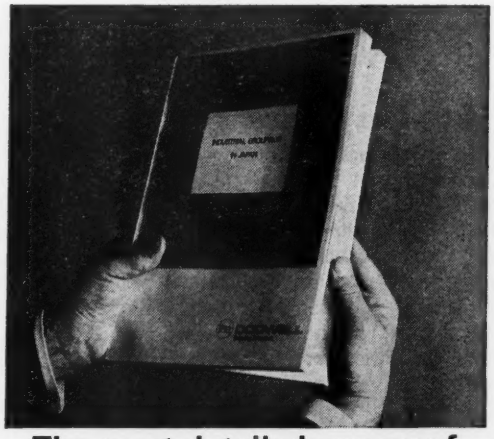

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A consumer boom in Japan

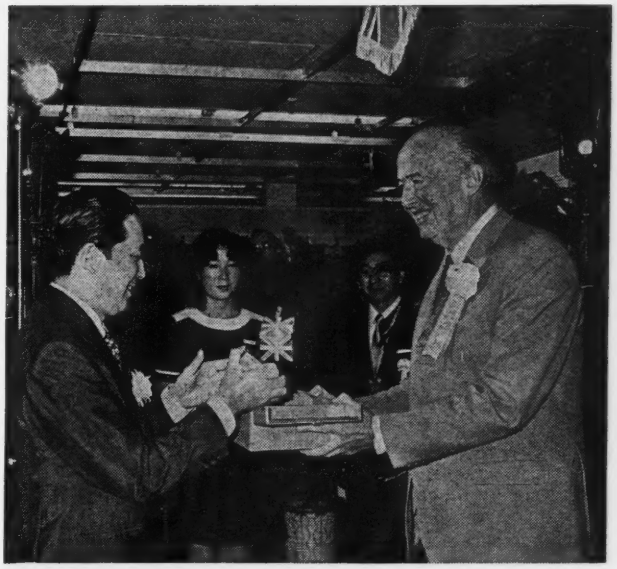
by Rex Gordon Farrar, First Secretary (Commercial), British Embassy, Tokyo

The 'Consumer Boom' has started. The 107 million Japanese consumers now have immense spending power and more leisure time to enjoy. Expenditure on leisure and consumer items is expected to double by 1975. More important to the British exporter, the Japanese consumer is showing intense interest in Western fashion and taste. This demand comes just when the combination of successive yen revaluation, big wage increases and high local costs offer potential not only for top quality luxury items but also for medium-priced imported goods. The timing is right for British exporters of consumer goods who have not so far entered the Far Eastern market, to take a look at Japan.

The target

JAPANESE department stores account for 70 per cent of the sales of imported consumer goods. Their total sales turnover this year is estimated to reach at least £5 billion, a 25 per cent increase over 1972. Among the top six company income earners listed by the tax authorities in February were four department store groups. Everything the consumer can possibly want is available on their shelves. The range of goods and services includes household items; leisure and sports equipment; food and drink; interior furnishings; homes for sale; holiday trips; and even membership in golf clubs.

Pictured from the outside, featuring its announcements about the British Fair is Seibu, the Japanese department store in Ikebukuro, Tokyo. The store promotion was one of many of those organised by the British Overseas Trade Board as part of its trade drive in Japan. Seibu sent buyers to London in order to have a large selection of the most up-to-date British quality consumer goods available from this promotion.



At a ceremony to launch the first British store promotion of the British Overseas Trade Board's current trade drive in Japan—Lord Thorneycroft, Chairman of the Board, presents Mr. Seiji Tsutsumi, president of the Seibu store with a symbol of Britain. Seibu are currently featuring the 'British Fair' promotion in their store in Tokyo.

British store promotions

This Autumn we are taking full advantage of the potential by greatly increasing the number of special promotions of British goods in department stores. In 20 major cities throughout Japan 57 separate department stores, including six leading groups, will hold special British Fairs—sponsored by the British Overseas Trade Board—a programme which equals the highly successful 1969 British Week in Tokyo. A list of these is given at the end of this article.

The aim is to increase buying from Britain. Already additional buying for this year's store promotions is likely to top the £5 million mark.

Cultural exhibitions

Side by side with their commercial activities, department stores in Japan pride themselves on being able to offer first class cultural and entertainment attractions for their customers. Families throng to their premises at the weekend, particularly on Sunday—the peak day for sales. To attract the crowds, nine department stores will mount major British cultural exhibitions organised by the Fairs and Promotions Branch of the British Overseas Trade Board, at the same time as their store promotions. Themes feature past and present triumphs in Britain; the traditional as well as modern technology. The exhibitions include valuable and irreplaceable historical exhibits and works of art, which have been loaned by museums and private collectors in Edinburgh, York, London (Guildhall) and Reading. Six curators from Britain will supervise the exhibitions. Merchandise-linked features will contribute to the British atmosphere.

Magnificent exhibitions are held regularly in these enormous department stores, all matching the size of London's largest.

(*continued on next page*)

Dramatic increase in British exports to Japan

DETAILS of the dramatic increase in British exports to Japan this year were given on October 10 by Mr. Peter Wakefield, Special Adviser to the British Overseas Trade Board. He was speaking to a conference on 'Profitable Participation in the Japanese Market' held in London.

Mr. Wakefield said that in the first eight months of 1973 British exports had amounted to some £174 million compared with £171 million for the whole of 1972. In the period January to August 1973 exports had increased by 62 per cent over the same period of last year.

'To surpass last year's total so early in 1973 is an achievement in itself,' said Mr. Wakefield, 'but even more dramatic have been recent monthly increases—exports in August 1973 were 96 per cent higher than in August 1972.' He said it was reasonable to expect a continuing high level of exports for the rest of 1973 and indeed, the total might well exceed £260 million.

Speaking on the theme of 'The main areas of opportunity for UK products' Mr. Wakefield said there had been particularly encouraging increases in sales to Japan of whisky (up 225 per cent), internal combustion engines (113 per cent), tractors (61 per cent), office machinery (79 per cent), clothing (85 per cent), and excavating machinery (93 per cent). In addition, there had been some significant moves by British firms such as Mothercare and Berni Inns to break into the Japanese retail and restaurant business.

'On present performance Japan must be Britain's fastest growing major export market,' said Mr. Wakefield.

A CONSUMER BOOM IN JAPAN
continued

To quote one example: works of art by Renoir, Picasso and Bellini, valued at more than £30 million, from a Brazilian art museum have been shown in a Tokyo suburban department store. The equivalent in Britain would be the showing of the famous Tutankhamen Treasures, not at the British Museum, but at the Croydon branch of a leading store.

BRITISH STORE PROMOTIONS, JAPAN 1973

Store	London Buying House
Matsuzakaya Ueno (Tokyo) Nagoya Osaka Ginza (Tokyo) Shizuoka	Associated Merchandising Corporation 1(B) Baker Street London W1M 1AA
Hankyu Main Store Senri Hankyu (Osaka) Sukiyabashi Hankyu (Tokyo) Oi Store (Tokyo)	Booker Export Services Ltd. The Adelphi John Adam Street London WC2N 6BD
Mitsukoshi Group Nihonbashi Main Store (Tokyo) Sapporo Store Osaka Store Takamatsu Store Oriental Nakamura (Nagoya) Sendai Store Ginza Store Shinjuku Store Yokohama Store Ikebukuro Store Hirakata Store Takamatsu Store Ehime Store Izutsuya Kokura, Kurume Hakata, Iizuka Yawata, Ube	International Contract Furnishing 177-178 Sloane Street London SW1X 9QL
Matsuya (Tokyo)	Metasco Ince 161/167 Oxford Street London W1R 2AY
Seibu Ikebukuro Main Store Omiya Store Funabashi Store Utsunomiya Store Hachioji Store Numazu Store Shizuoka Store Hamamatsu Store	J. Raymond Wilson 75/77 Margaret Street London W1N 7HB
Isetan and ADO group Isetan (Tokyo) Marui-Imai, Sapporo Marusan-Tsuruya, Kushiro Onuma, Yamagata Fujisaki, Sendai Ueno, Utsunomiya Fujigo, Takasaki Isejin, Mito Maruhiro, Kawagoe Komiya, Kawasaki Shizawa, Odawara Meitetsu, Nagoya Hanshin, Osaka Tokiwa, Oita Yamagataya, Kagoshima Tsuruya, Kumamoto Iwataya, Fukuoka, Kurume and Tohata Hamaya, Nagasaki	Dean Warburg Ltd. 38 Savile Row London W1X 2ET

The Duke and Duchess of Kent arriving at the Mitsukoshi department store in Tokyo to open the British store promotion. They are being greeted by the Mitsukoshi Fashion Sisters, who are dressed in traditional Scottish clothes for the occasion.

The future market

The special export drive this year with department store promotions and the London Fashion Festival in Tokyo (see separate report on page 123) has been undertaken with two aims: first, in the short term, to stimulate increase in the range of British goods bought by department stores; second, in the long term, to intensify the development of in-depth sales to this immense market by leading British exporters. Many major British firms are taking advantage of the situation, but we are still scratching the surface. The potential matches that of the USA or Germany for consumer goods. Department store promotions help to achieve this aim.

Entertainment and hard selling at Tokyo's London Fashion Festival

by Rex Gordon Farrar

Go-go dancing, beat music, beautiful girls, exciting choreography. No, not as you might imagine a reference to the latest musical revue: but an impression of the London Fashion Festival, mounted in Tokyo between September 21-25.

This splendidly spirited series of 'Fashion Spectaculars' was seen by over 18,000 people at the 16 performances held. The cast consisted of 34 British and Japanese models. Between them, 335 examples of British men's and women's wear were shown to enthusiastic audiences; mainly customers from participating department stores, but also design students, fashion and business circles. The fashion wear featured ranged from everyday wear, sporting attire, winter furs, summer creations to haute couture. The scenes changed rapidly. We saw Henley, the Grand National, Mayfair, Winter Snow, Scotland and the Concorde. The themes included Gunmen and their Molls, Rowers, Horse Racing, Back to School and the Ultimate in Sophistication. The creations of many British clothing exporters were on show.

The 'Hard Sell'

Entertainment, it certainly was. More importantly, the London Fashion Festival was a commercially based 'Hard Sell'. Of the clothing featured, 90 per cent represented examples of merchandise worth £1 million bought from Britain by eight leading Japanese department stores especially for the occasion. British menswear, womenswear and childrenswear were on sale at these important retail outlets during the London Fashion Festival. The event focused attention on the big trade drive being mounted this year to increase exports of British clothing and accessories to Japan. We are achieving this aim.

London Fashion Festival was organised by the Clothing Export Council of Great Britain and co-sponsored by the British Overseas Trade Board and a leading Japanese design institute (and fashion magazine publishing house) Bunka Gakuen. It was an Anglo-Japanese venture, and all concerned co-operated wholeheartedly to ensure its undoubted success.

Gala performance

The highlight of the London Fashion Festival was the gala performance on the evening of September 22. This was honoured by the presence of Their Royal Highnesses Duke and Duchess of Kent and four members of the Japanese Imperial Family, Their Imperial Highnesses, Princess Hitachi, Princess Chichibu, Princess Mikasa and Prince Tomohito. Lord Thorneycroft, Chairman of the BOTB, was also present at the gala show as co-host with the President of Bunka Gakuen. The Royal Party warmly applauded the performance and afterwards met the cast backstage. During their stay in Japan the Duke and Duchess of Kent also attended the inauguration of the British Export Marketing Centre and visited six of the eight department stores participating in the Festival.

The department stores concerned were bedecked with Union Flags and had organised impressive displays of British clothing and other consumer goods from the UK. The Duke and Duchess of Kent were greeted by the presidents and managements of the stores. Special attractions seen by the royal couple included a King's Road style boutique-cum-pub, A Royal College of Art exhibition (and fashion show), and a British Food and Drink Fair. Two stores added to the colour of the occasion with 'beauty queens' dressed in kimonos and British fashionwear.

The Duke of Kent backstage at the London Fashion Festival in Tokyo meets some of the Japanese models who took part in the show. The Duke and Duchess attended the fashion spectacular, as well as members of the Japanese Imperial Family. The British Overseas Trade Board, which sponsored the London Fashion Festival, is staging a trade drive in Japan which includes specialist exhibitions and store promotions, designed to show the best of Britain's products and services.

The London Fashion Festival, which was even styled a 'British Week', has ended: but the drive to increase sales of British-made clothing—indeed all consumer goods—to Japan is just gathering momentum. The 57 special promotions of British goods in Japanese department stores this autumn will give an additional boost to this effort. The top quality market is important but we now find quality medium priced merchandise from Britain has potential. In-depth sales from Britain is the aim throughout Japan. And why not with the 107 million inhabitants showing increased readiness to sample Western tastes and fashions. This can and should mean that they will 'Buy British.'

Information on 'T & I' material

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How to avoid dropping a brick. A demonstration by Lord Thorneycroft, President of the British Overseas Trade Board, amuses Mr. Peter Walker, Secretary of State for Trade and Industry (left), and Mr. Frank Cole, chairman, National Exhibition Centre Ltd. The picture was taken at the centre's site at Birmingham last week after the breakfast-time export presentation in the city. Over £2 million of work has been done since construction started in February. The opening date for the NEC—which has Government support—is January 1976. The centre will have a million square feet of exhibition halls, a 1,200 bed hotel, rail and air links, and a landscaped area with boating lake.

Sir Peter Allen to attend Britec 73 opening ceremony

THE Department of Trade and Industry, sponsoring the British Industrial Technology Exhibition in Bilbao, is represented at the opening ceremony today, October 18, by Sir Peter Allen. Sir Peter, 68, a leading industrialist, has been a member of the British Overseas Trade Board since its inauguration in January 1972.

As a member of the Board, Sir Peter will be talking to as many of the exhibitors as he can, as well as to the Spanish organisers of the exhibition. 'We consider this a very important exhibition as it is entirely British in concept,' he said. 'Trade is increasing between Britain and Spain and we want to continue this trend. Other joint ventures I have visited recently—such as at the Hanover machine tool fair and Paris leather week—have proved very successful and we are hoping Britec 73 will be even more so. I shall be talking to exhibitors to see how they are faring.'

Sir Peter, who plans to spend a couple of days at Britec, will be accompanied by his Spanish-born wife. Sir Peter is a director of British Insulated Callender's Cables and a director of the Bank of Montreal. Most of his business life, has been spent with Imperial Chemical Industries Ltd. Among other appointments, he is chairman of the Anglo-Spanish Society in London, an organisation which exists to promote continuing cultural relations between Spain and Britain.

Overseas publicity for UK trade fairs

British commercial representatives overseas are keen to publicise UK trade fairs and exhibitions, and welcome posters and brochures from fair organisers. But material must be sent well in advance—at least three clear months ahead of the event—and in sufficient quantity—two or three dozen copies for the representative in each area. A full list of addresses of commercial representatives is published as a quarterly supplement to *Trade and Industry*.

Education and Training for Overseas Trade

A SEMINAR on Education and Training for Overseas Trade is being held before an invited audience by the British Overseas Trade Board on October 25 at the Carlton Tower Hotel, London. The seminar follows the recent publication of a report on the same subject prepared by Mr. David J. Liston, pro-director of the Polytechnic of Central London and education advisor to the BOTB (see *Trade and Industry*, pages 114-5, July 19, 1973).

The seminar, under the chairmanship of Mr. G. V. K. Burton, chairman of Fisons Ltd., and a member of the BOTB, will examine the education requirements of industry and commerce in the spheres of overseas trade and exporting, with the intention of helping to achieve the most effective use of available educational facilities. The contributions of the various organisations involved in providing or planning the use of appropriate educational resources will be discussed.

Mr. Liston will be the opening speaker, talking on the 'national scene'. Other speakers will be: Mr. J. S. Cassels, chief executive, Training Services Agency, Department of Employment; Prof. N. C. Hunt, professor of business studies, University of Edinburgh, and chairman of the University Grants Sub-Committee on Business and Management Studies; Mr. J. A. Raven, director-general of the Association of British Chambers of Commerce and vice-chairman, Simplification of International Trade Procedures Board; M. Philippe Agid, general secretary of Fondation Nationale, Paris; Mr. G. N. Bowman-Shaw, chairman, Lancer Boss Group Ltd.; and Mr. E. J. W. Hellmuth, executive director, Midland Bank Ltd.

Time will be allowed for questions and general discussion. Among those invited to attend are representatives of professional institutes, chambers of commerce, Government departments, academies and exporting companies.

Seven thousand reels of computer tape being loaded for export to Australia. It was the largest single container load of tape to leave Racal-Zonal's Redhill factory, and the sixth such container load of magnetic films and tapes sent to Australia in 12 months. The tapes were ordered by Racal Electronics Pty Ltd., of North Ryde, NSW, for distribution to two customers—Dataset (Australia) Ltd. and the Australian Bureau of Census at Canberra.

DTI Ministers address 9,000 at nationwide export presentations

Breakfast-time was the hour chosen to invite businessmen to 10 simultaneous export presentations across the country on October 9. The enterprise drew the largest gathering of UK businessmen ever assembled at the same time—over nine thousand. The object was to speak about new opportunities for Britain in export markets and to describe the Government's back-up services.

In addition to the five centres illustrated, there were presentations at Nottingham (Lord Drumalbyn), Norwich (Lord Limerick), Newcastle (Mr. Anthony Grant), Bristol (Mr. Cranley Onslow), and Southampton (Mr. Peter Emery).

There was extensive press, radio and television coverage.

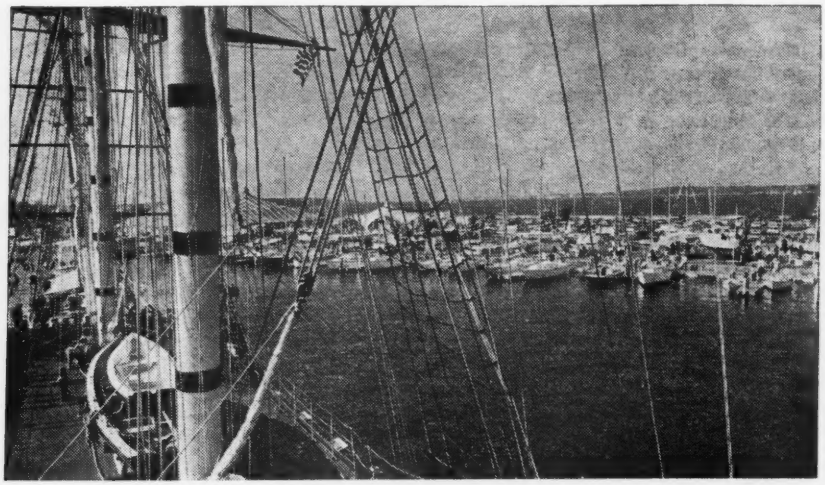
BIRMINGHAM: Mr. Peter Walker, Secretary of State, Trade and Industry, accompanied by Lord Thorneycroft, Chairman of the BOTB (right); Councillor Mrs. Marjorie A. Brown, Lord Mayor of Birmingham; and Mr. R. L. Sutton, director, West Midlands Region, DTI.

MANCHESTER: Sir Geoffrey Howe, Minister for Trade and Consumer Affairs (third from right), before the presentation, with Mrs. Phyllis James, director, North Western Region, DTI; Mr. Jan Lewando, member, BOTB; Ald. Ken Collis, Lord Mayor of Manchester; and Mr. Norman Statham, Minister (Economic), British Embassy, Bonn.

LEEDS: Mr. Christopher Chataway, Minister for Industrial Development, at a press conference.

CARDIFF: Mr. Michael Heseltine, Minister for Aerospace and Shipping. (Photo by courtesy of Western Mail and Echo Ltd.)

GLASGOW: Mr. Tom Boardman, Minister for Industry, speaks to a large gathering at the Albany Hotel. (Photo by courtesy of the Glasgow Herald).



Part of the Newport International Sailboat Show seen from the quarter-deck of 'Rose', a replica of a 20-gun frigate built in Hull in 1756.

Plain sailing for UK boatmen at Newport international show

From G. A. Kent, Vice-Consul (Commercial), British Consulate-General, Boston, Mass.: The Newport International Sailboat Show was held in glorious weather, September 27-30, at Newport, Rhode Island, the site of the America's Cup races. As a background to the exhibition, the tall masts of *Rose*, a full-size replica of a 20-gun frigate built in Hull in 1756, wearing the red ensign of the 18th century, gave the occasion a particularly British flavour.

This boat show is held at Goat Island Marina in Newport and has facilities for over 100 floating exhibits as well as about five acres of shore-based displays. It is truly international in aspect and, in the three years that it has operated, has attracted a large Canadian showing and a growing British participation which this year included a joint venture sponsored by the Ship and Boat Builders National Federation, supported by the British Overseas Trade Board. Australia, France, Greece, Holland, Japan and Sweden contributed to the international scene with boat and hardware exhibits.

An additional attraction for the visitor was the possibility of taking trial sails in a number of demonstration boats tied up at the marina. It was also possible to follow the manoeuvrings of a fleet of schooners, varying from 30 ft. in length to 120 ft., in races held in the bay off Goat Island. The appearance of the yacht *Bloodhound*, formerly owned by the Queen, and dressed overall, added another touch of British interest to the occasion.

There were seven British exhibitors with on-shore displays under the sponsorship of the SBBNF: Honnor Marine Ltd., showed its Drascombe line of boats; A. J. S. Sandwich Yacht Construction Ltd., its Telstar trimaran; Small Craft (Blockley) Ltd., its Privateer, a gaff rigged cutter. Within the main exhibition tent the SBBNF had an attractive stand with exhibits from Jack Holt Ltd., Ian Proctor Metal Masts Ltd., Simpson-Lawrence Ltd., Baron Instruments Ltd. and Thomas Foulkes.

In addition to the SBBNF exhibit, Camper and Nicholson displayed afloat the new Mark X Nicholson 32. Many visitors were attracted by her seven-year-old sister ship, *Gulliver G*, owned by Miss Clare Francis who sailed her across the Atlantic single-handed this year.

Decca Marine Inc. had an extremely impressive exhibit in the 57 ft. trawler yacht, *Navigator II*, which carried its full range of navigational aid equipment valued at some hundred thousand dollars.

On shore, M. S. Gibb Ltd., through its American company, displayed marine hardware; Richmond Marine Ltd., a display of Skipper sailing dinghies; and Minisprint, through its New England agent and on the same stand, the Lark sailing dinghy by John Baker Ltd. British Seagull outboard engines, Avon inflatables, Munster Simms pumps and Marlow ropes were prominently displayed on the stand of New England agents. On another stand were to be found the American versions of the Perkins marine diesel engine, British Leyland diesels and Petter diesels.

Increased business forecast

There was an air of lightheartedness about this outdoor show in an ideal setting and sunny weather which is not apparent in indoor exhibitions. It is, therefore, particularly gratifying to report that, in terms of serious business, initial indicators show that there was a considerable amount of interest in two of the yachts shown for the first time in America—the Tristar trimaran and the Privateer.

It was also very encouraging to learn that those who had exhibited before have consolidated their positions and have continued to receive heartening inquiries from OEM sources and wholesalers which should lead to a substantial increase in business.

While no official attendance figures have been published, it seems probable that the attendance was in excess of 50,000. The British exhibitors were impressed by the interest and knowledge of things boating expressed by their visitors. They regarded the show as highly successful and indicated a desire to exhibit in 1974 when the show will be held at the same time as the America's Cup races off Newport.

British store promotions in Denver, Dallas, Ohio and Florida

THE Denver Dry Goods Co. of Colorado has announced plans for a British store promotion to be staged in the autumn of 1975 with the support of the British Overseas Trade Board. The promotion will be the curtain raiser for the 1976 bi-centenary celebrations which have already stimulated demand for merchandise with a bi-centenary theme.

It is expected that all the Denver Dry Goods store in downtown Denver—with an area of 376,000 sq. ft.—will be used for the British promotion. In addition, a further nine stores in the Denver Dry Goods Group will feature British products and be decorated to display the theme of London life.

During 1974, several teams from Denver will probably visit Britain to plan promotional material, arrange supporting events and survey the British market for consumer goods. In spring 1975, about 20 buyers will come to Britain to make purchases especially for the promotion.

The products most likely to be in demand are jewellery, silver, china and glass, reproduction furniture, antiques, pictures and prints, foods, gourmet cooking utensils, toys and games, sporting equipment, children's wear (winter), teenage fashions, menswear, ladies' ready-to-wear, sports wear, fabrics and yarns, needlepoint, linen and blankets, luggage, books and stationery, bags, accessories and cosmetics. The London buying house is Associated Dry Goods (UK) Ltd., Great Titchfield Street.

Meanwhile, Neiman-Marcus of Dallas, the largest store in Texas, is currently staging a British Fortnight. The event, supported by BOTB, opened on October 15. A wide range of British consumer goods on sale comprises books, speciality foods, men's and children's wear, stationery, leather goods, jewellery, toys, china and glass, garden furniture and many other products. There is a fashion boutique, an antique shop and special displays including fine china and Sheffield plate.

A series of events is designed for each day including a fashion show, a demonstration of English cookery, fur shows and an auction to be conducted by Sotheby-Parke Bernet. The whole promotion is set against typically English scenes, such as the Royal Pavilion at Brighton, a high street with Burlington Arcade-type shops and a London club. One of the major settings being provided by BOTB is an 'Oxbridge'-style quadrangle where many traditional and modern products will be on sale and display.

The largest jig-saw in the world is currently being shown during three store promotions of British goods by the May Group of stores in Ohio and Florida. The British jig-saw is made by Condor Toys Ltd. and depicts a Swiss scene handpainted on wood measuring 20 ft. by 10 ft. and comprising 30,000 pieces. Mr. John Potter, production manager of Condor Toys Ltd., is also demonstrating the cutting of jig-saws in the stores.

The British Overseas Trade Board is supporting the participation of British firms in this September/October event. They include the Chess Centre stand where John Hannah is producing and painting chess pieces and the Chelsea Pottery stand where Barbara Ross is throwing, decorating and glazing her pottery on the spot.

The wide range of British goods displayed includes clothing, giftware, confectionery, chinaware, food, toys and drapery.

Carpex '74 cancelled

THE London Carpet and Floor Coverings Fair, due to be held at Earls Court, London, February 25 to March 1 next year, has been cancelled.

UK strikes gold —another medal at Algiers fair

From D. R. Collard, Counsellor (Commercial), British Embassy, Algiers: At the close of the 10th Algiers International Trade Fair, September 1-20, Britain was, as last year, awarded a gold medal. The medal was awarded at a ceremony presided over by Monsieur L. Yaker, Minister of Commerce, who was accompanied by a number of other Ministers.

Some 46 countries participated this year compared with only 40 last year. Britain's own participation was much improved and a brighter and fuller Pavilion housed our exhibits. The number of firms participating was 31, compared with 24 last year. The demand for space in the British Pavilion was much heavier than in past years and, unfortunately, some applicants had to be turned away and others were given a smaller area than they would have wished. Provision is being made next year for a much larger display area and negotiations have already begun with the fair authorities to this end.

The British Pavilion attracted a great deal of favourable comment from representatives of other countries participating in the fair, from British firms with stands in it and also from the Algerian authorities.

The Earl of Limerick, Parliamentary Under-Secretary of State for Trade, attended the fair and was present for the reception on Britain's National Day, September 5. He also called on Ministers and senior civil servants to discuss matters of major importance to our export effort in Algeria.

Despite the fact that the Conference of Non-Aligned Countries was taking place in Algeria during the first few days of the fair, President Boumediène opened the fair as in past years.

British firms participating in the fair had improved sales over last year. Serious inquiries have also exceeded last year's. Reports submitted by exhibitors in the British Pavilion generally show that they were satisfied with their participation and in most cases are planning to come back next year with an improved display. The fair, which had in past years tended to be a simple shop window of some of the goods that Britain was selling or could offer to Algeria, is rapidly becoming an event where an increasing volume of serious business is discussed.

Lord Limerick, Parliamentary Under-Secretary of State for Trade, meets representatives of Xlon Products Ltd. of London in the British Pavilion at the Algiers International Trade Fair.

In Dublin, visitors talk with British exhibitors in the BOTB-supported joint venture at Ireland's Fourth International Food and Drink Fair, held in September.

On right lines at Basle rail show

From Ivan H. May, Consul, British Consulate, Basle: The first World Railways Engineering Exhibition (RAIL 73) was held in the halls of the Swiss Industries Fair, Basle, October 1-5, and attracted between six and seven thousand railway operators and associated specialists from more than 30 countries. In addition to visitors from all over Europe, others attended the event, either independently or in organised groups, from the USA, Mexico, Brazil, Japan, South Africa, Tunisia, USSR, India, the People's Republic of China and Australia, among other nations.

One hundred and eleven exhibitors from 17 countries occupied a gross area of 13,000 m² which included 1,400 m of track inside and outside the halls. This accommodated the rail-mounted exhibits; the diesel and diesel-electric and electric locomotives, shunters, passenger coaches and track maintenance vehicles. Other exhibits included axles, brakes, bogies, permanent way materials, signalling and telecommunication systems, ballast handling equipment, snow ploughs and two-way vehicles.

Seven British companies took part under the British Overseas Trade Board's joint venture scheme organised by the London Chamber of Commerce, and two others, including the British Steel Corporation, exhibited independently. The comment of one UK firm was typical of many: 'We have fully accomplished our objective of creating interest for our products in the international railway industry markets. The number and quality of inquiries has been far greater than anticipated.'

Big new consumer goods promotion in Bavarian cash-and-carry markets

From Peter Bryant, Office of the British Trade Drive in Southern Germany, Munich: On September 24, Sir Nicholas Henderson, KCMG, Ambassador in Bonn, declared open a British consumer goods promotion in one of the two big cash-and-carry markets in Munich of the Bayerische Lagerversorgung GmbH. This marked the start of a two-week promotion in all 16 such markets of this organisation throughout Bavaria and also in five retail markets.

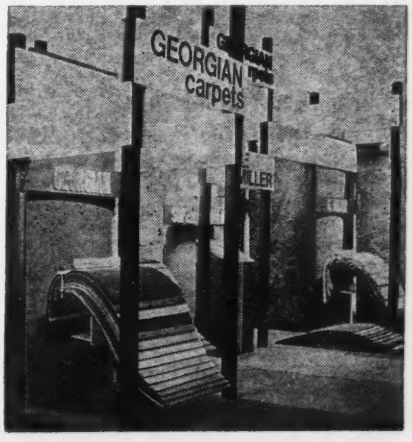
The initiative for this promotion came from the Bayerische Lagerversorgung (BLV), following a successful British Week in one market in April 1972. BLV has a total annual turnover of DM1 milliard (about £170 million). Its customers are hotels, restaurants, industrial firms with canteens, and medium and small retailers. It is, therefore, well-placed to introduce British consumer goods into the Bavarian market and the promotion fitted well into the pattern of the South German Trade Drive.

The greatest emphasis in the promotion was on food and drink products, especially confectionery, soups, sauces, jams, tea, Scotch whisky and gin. But there was also a good selection of non-food items, for example, tableware, silverware, kitchen equipment and some clothing.

BLV now has 350 different British products on sale and about half of these were new lines introduced for the promotion. The new products were chosen from about 1,000 which were market tested and BLV's management is confident that 98 per cent of them will be kept on as regular lines, as a result of the promotion. The BLV's current annual turnover of British goods is about DM3.5 million (£600,000) and the management hopes that the promotion will increase this by a further DM2 million (£330,000).

Mr. K. J. Green, Deputy-Director, Fairs and Promotions Branch, DTI, responsible for special events, and Mr. P. G. F. Bryant, Director of the South German Trade Drive Office, visited other BLV cash-and-carry markets in Passau and Bamberg and both took part in a function organised by the second large market in Munich.

Increased sales of British goods because of the promotion were well up to expectations.



Part of Georgian Carpets' stand at the recent 9th Congress of International Interior Decorators in Munich. The stand was shared with underlay manufacturers, Durie and Miller. Bruce Rainsford, chairman and managing director of Georgian, reports that as a result of exhibiting new accounts were opened with a number of premier stores in Munich, Dusseldorf, Stuttgart and Hamburg.

CBI party visits Brazilian centres to further trade and investment

TEAM of 16 top-level industrialists will arrive in Rio de Janeiro, Brazil, on October 20 at the start of a 12-day mission organised by the Confederation of British Industry and supported by the British Overseas Trade Board. The leader of the mission is Sir Geoffrey Wallinger, a past British Ambassador to Brazil and a director of Lloyds and Bolsa International Bank Ltd.; he is also chairman of the British sector of the Anglo-Brazilian Joint Committee for Economic Co-operation which was set up in 1971 by the CBI and its Brazilian counterpart, the Confederacao Nacional da Industria, to promote technical and economic co-operation. Lord Caldecote, chairman of Delta Metal Co. Ltd. is deputy leader.

The aims of the mission are two-fold: first, to show British industrialists the opportunities in Brazil for furthering trade and investment; second, to point out to Brazilians that top-level British businessmen recognise the great potential of Brazil as a rapidly expanding market. It is hoped that the mission will influence the expansion of two-way trade and industrial co-operation between the two countries and stimulate interest in the British Industrial Exhibition which opens in Sao Paulo in August 1974.

UK–Brazil trade increases

Since the last British Industrial Exhibition was held in Brazil in 1969, states CBI, trade between Brazil and the United Kingdom has steadily increased: the UK's imports from Brazil have risen by 70 per cent from £50.7 million in 1969 to £86.3 million in 1972, while British exports to Brazil increased by 90 per cent from £43.8 million in 1969 to £84.2 million in 1972. However, during the first six months of 1973 the rate of growth of Brazilian exports has outstripped those of the British.

Extensive programme

During their stay in Brazil the members of the mission, which represents a wide cross-section of industry, will visit Rio de Janeiro, Brasilia, Sao Paulo and several regional capitals. They will have talks with federal and state officials and leaders of business and commerce. Sir Geoffrey Wallinger will make a courtesy call on the Minister for Foreign Affairs, Senhor Mario Gibson Barboza, on October 22 in Brasilia.

Members of the mission

The mission members are: Sir Geoffrey Wallinger (Leader), director, Lloyds and Bolsa International Bank Ltd.; Rt. Hon. Viscount (Robin) Caldecote (Deputy Leader), chairman, Delta Metal Co. Ltd.; Michael Boughton, managing director, Engineering Division, Tube Investments Ltd.; Michael Caine, director, Booker McConnell Ltd.; Christopher H. Corfield, deputy chairman and joint managing director, Midland Aluminium Co. Ltd.; Ken W. Cotterill, under-secretary, Export Credits Guarantee Department; Richard H. Davies, director, Ferranti Ltd.; James L. Galloway, managing director, Brefcon International Ltd.; Denis W. G. L. Haviland, director, Short Brothers and Harland Ltd.; N. D. Norman, director, Fairey Britten-Norman; Mark Littman, QC, deputy chairman, British Steel Corporation; Bruce Lloyd, senior executive, Commonwealth Development Finance Co. Ltd.; Hugh Mellor, director, Dalgety Ltd.; Jack B. Reardan, director, British Leyland International Ltd.; John R. M. Whitehorn, deputy director general, CBI; Harry Terrell (secretary), CBI.

Seventeen British companies participated in a joint venture of the British Overseas Trade Board and the Electronic Engineering Association at Japan's Electronics Show, Osaka, October 1-7. Picture taken at the exhibition shows, l to r: M. Yoshii, Commercial Officer; D. Warren Knott, Acting Consul-General, Osaka; John Wilson, editorial consultant, New Electronics; *Frank Sherry, EEA Information Officer.*

Bulgarian delegation's visit to Birmingham

HIGH-level delegation from Bulgaria, led by the Deputy Minister of Foreign Trade, Mr. Ivan Ivanov, visited Birmingham on October 9.

The day's programme, arranged by the Birmingham Chamber of Commerce and Industry, included a lunchtime meeting and discussion with 35 representatives of some important Midland companies involved in trade with Bulgaria.

The delegation included the Directors-General of Bulgarian State Commercial Enterprises for metals, machinery, industrial plant, electronics and all know-how and licensing agreements. Deputy Leader of the mission was Mr. Z. T. Karamotchev, chairman of the British Section of the Bulgarians' State Chamber of Commerce and Industry. Directors of the Bulgarian Foreign Trade Bank and the petro-chemical complex at Devnya were also included in the party.

The visit was in return for the largest industrial mission to Bulgaria which was sponsored last May by the Birmingham and London Chambers. As a result of that visit the Chambers published a full report on the prospects for British companies in Bulgaria which is still available.

The delegation had talks with the London Chamber of Trade, called at the DTI headquarters (see page 131), and visited Liverpool.

BOTB supports major car drive for China trade

A DELEGATION of 13 leading representatives of the British motor industry leaves London on November 2 on the first official motor industry visit to the People's Republic of China.

Led by Gilbert Hunt, CBE, President of the Society of Motor Manufacturers and Traders, the prime purpose of the 14-day visit will be to explore trade and technical co-operation opportunities with China's motor manufacturing and vehicle servicing industries.

The visit, November 3-17, marks the latest stage in the growing Chinese interest in the British motor industry which was initiated last October when a delegation from the China Mechanical Engineering Society toured a number of British vehicle and component plants. The purpose of the visit by the Chinese automotive delegation was to examine modern technology and production methods within the British motor industry.

China accounted for a very small proportion of the £1,319 million worth of British motor products exported last year, states SMMT: in 1972 UK exports of automotive products to China totalled £294,000.

The preliminary itinerary of the mission includes visits to vehicle plants in Peking, Changchun, Nanking and Shanghai; technical discussions with foreign trade organisations; and lectures by mission members to various Chinese engineering societies.

The mission, sponsored by the Society of Motor Manufacturers and Traders, is supported by the British Overseas Trade Board.

Engineering body's group exploring Far East

THE Engineering Industries Association has sent another selling mission, Engtrade 24, overseas—this time to the Far East. This follows the export successes gained by its recent mission to Australia. The 17 delegates taking part in the mission left London by air on October 14, for Malaysia, Singapore, Hong Kong and Thailand.

The British Overseas Trade Board-supported mission is spending three days in Kuala Lumpur, four days in Singapore, six days in Hong Kong and the final four days in Bangkok. The mission is under the leadership of F. H. Toft, MBE, vice-chairman of EIA's National Export Committee and sales director of Denford Machine Tools Ltd.

Since the formation of the National Export Committee in 1966, states EIA, some 300 engineering firms have participated in various Engtrade missions and overseas exhibitions and they have secured a total of nearly £50 million in orders.

Engtrade 24 is promoting the sale of a comprehensive range of both light and heavy engineering products ranging from large cranes and machine tools down to hacksaw and bandsaw blades. Between these extremes the products include clay working machines, diamond compounds and machines, veneer and paper knives, spray guns and ancillary equipment, book binding and laboratory equipment, industrial chairs, cable measuring machinery and water control equipment. The mission was seen off by Henk Holleman, chairman of EIA National Export Committee, and T. R. Wade, director.

Next year, five further trade missions have been planned by the Association to visit South Africa, Brazil, Japan, Australasia and the West Coast of Africa (Nigeria and Ghana).

National Coal Board initiative in USA

MR. W. V. Sheppard, CBE, deputy chairman, National Coal Board, was the leader of a small group of experts who recently gave presentations at one-day seminars in Chicago, Charleston and Pittsburgh, attended in total by about 100 American coal mining executives and engineers.

The accent was on longwall mining, a system used extensively in Britain's coal mines, and for which NCB, working closely with British mining machinery manufacturers, has developed techniques and equipment which are being used to obtain high tonnage production in many countries.

With a soaring energy demand and uncertainty of oil supplies, development of indigenous fuel sources has become vital and therefore it was a particularly opportune time to draw attention of American coal mine operators and engineers to the developments taking place in UK coal mines and British mining machinery, writes R. F. Gash, C.Eng., AFRAeS, Consul (Commercial), Cleveland.

During the period 1971/72, many US utilities, under legislative pressure to reduce pollution, switched from coal to gas, but now, with less oil available, coal is back in fashion. New mines are on the drawing board or in process of development and some mines which have been closed are being reopened. It was with the knowledge of this industrial background that, after a miner-to-miner introduction by the deputy chairman, the NCB team, consisting of Mr. R. Hunter, director, Staffordshire area; Mr. G. Hayes, deputy director, North Yorkshire area; Mr. G. Hacking, colliery general manager, Sherwood Colliery, Notts.; and Mr. T. Carr, deputy director at the National Coal Board's research and development facility at Bretby, gave pictorial presentations on varying aspects of longwall operating experience.

These presentations covered many of the problems being faced at the present time in US coal mines, including ventilation, strata control, the need to increase productivity and safety requirements. The team also covered the training of personnel, the types of equipment and machinery in use at UK mines and what is being done to develop and produce new machinery to meet new and improved mining methods.

There can be no doubt that the initiative taken by the deputy chairman and his team in giving these presentations highlighting the achievements of British miners and mining machinery manufacturers, has come at a most opportune time. With this emphasis on coal, the US coal mining industry is showing definite signs of resurgence and one can reasonably expect this to lead to orders for capital equipment. Apart from talking the same language, the British coal mining industry clearly has experience, technology and machines which can also be used to advantage by US operators.

Canadian dealers

MORE than 160 Canadian dealers and their wives recently visited Howard Rotavator Co. Ltd. at West Horndon, Essex. Howard Rotavator believes this was one of the largest parties of dealers from North America ever to visit the UK. The dealers were supplied by Forano of Plessisville, Quebec—Howard Rotavator distributor for Eastern Canada.

Visitors toured the factory, attended a film show and saw working demonstrations of the Howard Bigbale system, the Spike Rotor, the S100 Rotavator and garden Rotavators.

Howard Rotavator invited other companies to attend the demonstration, so the Canadians also saw Parmiter, Froment and Fahr equipment handled by Forano in Canada.

In Britain for the first time last month was Mrs. Hsieh Chen, managing director, Crittall-Euco of Kuala Lumpur, on a seven-day fact-finding mission as a guest of Crittall-Hope of Braintree. Production capacity of the Malaysian company has doubled since the Essex window manufacturer purchased a 50 per cent holding in it 12 months ago. Mrs. Chen is seen here with her husband and Mr. John F. Crittall, chairman of Crittall-Hope Ltd., examining one of the louvres made in Malaysia.

Scottish new town sends team to West Germany for trade and investment

A SCOTTISH new town is sending its own team of industrialists and development corporation officials on a week's intensive trade and investment promotion visit to West Germany next month. In the group, from East Kilbride, Lanarkshire, will be directors and senior executives of 14 local companies interested in forming joint venture and licensing agreements with German firms.

With them will be George Grassie, chief estates officer of East Kilbride and Stonehouse Development Corporation, and George Williamson, the Corporation's principal marketing officer, who will discuss with German industrialists the opportunities for direct investment in East Kilbride and in Stonehouse, 12 miles away, designated as Scotland's latest new town, which is still at the early planning stage.

The group will be in Germany, November 14-21, and will visit Frankfurt, Stuttgart, Hanover and Hamburg. The tour has been arranged by the Development Corporation as part of their continuing campaign to bring European and other foreign industrial investment to East Kilbride and later to Stonehouse, while at the same time helping local manufacturers to take advantage of opportunities for joint ventures and licensing agreements with companies abroad.

Informal discussions on arrangements for the November promotion took place with members of a group of more than 20 directors of German chambers of industry and commerce when they visited East Kilbride on October 5 during a Scottish industrial tour. Leading the group was Dr. Cornel Renfert, director of the German Chamber of Industry and Commerce in Paris. The group, in London for its bi-annual conference, included Herr Paul Broicher, director general of the Association of German Chambers of Industry and Commerce in Bonn, and his assistant, Dr Guenther Albrecht.

In East Kilbride, the Germans met officials of the Development Corporation, toured housing and industrial areas and attended a luncheon at which George Wallace, chairman of East Kilbride and Stonehouse Development Corporation, presided.

Far East motor traders see UK plants and depots

A TWELVE-STRONG delegation of motor component wholesalers from the Far East last month carried out a tour of the UK factories, sales offices and distribution depots of the Quinton Hazell group, the international motor component manufacturers and distributors.

The visitors—from Hong Kong, Singapore, Malaysia, Thailand, Korea and Indonesia—spent 10 days on tour. They visited production lines in Lytham, Lancashire; Colwyn Bay, North Wales; Byfleet, Surrey; and Redditch in the Midlands. The visitors were met in Colwyn Bay by George Stansfield, First Secretary (Commercial), British High Commission, Singapore, who was holidaying in the district.

On the distribution side, the delegates—led by Tan Yew Kong, managing director, Quinton Hazell (Far East) Ltd.—saw the group's central distribution stores at Coventry and a typical wholesale depot.

The visitors were given two receptions, one by the main board of Quinton Hazell, which is based at Leamington Spa; and the other by the group's marketing division at Balsall Common, Warwickshire.

Graham Roberts, Quinton Hazell's marketing director, said: 'While the EEC is occupying a great deal of our attention at present, we have no intention of overlooking the vital importance of our traditional markets, particularly in the Far East which is one of the fastest growing markets in the world. Our exports to this area are currently worth more than £1 million a year. From comments made to me by the delegates, I anticipate a further boost as a direct result of this visit. Before the delegation left Britain, members placed orders worth a total of £70,000.'

Quinton Hazell—a member of the Burmah Oil group—exports to over 160 countries and has subsidiary companies and factories in Holland, Denmark, Italy, South Africa, Singapore, Australia and the Republic of Ireland. In 1972, the group won the Queen's Award to Industry for its export achievements.

Food and drink party ventures in Australia

FOOD and drink trade mission of 14 members, sponsored by the British Food Export Council and supported by the British Overseas Trade Board, assembles in Sydney, Australia, on October 20. The mission is led by W. James Eastwood, MBE, export manager, C. Shippam Ltd., Chichester.

BFEC sent its first mission to Australia in 1967: on that occasion substantial sales of frozen and canned fish and biscuits were achieved; other companies concluded manufacturing arrangements.

In comparing the figures of exports to Australia between 1967 and 1972, states BFEC, the total exports of all capital and consumer goods has risen by 10 per cent. Sales of foods on the other hand have increased by 123 per cent. Over A$14 million were imported from the UK in 1972. In addition to this, there has been substantial investment in the food industry. In 1972, for example, a large amount of instant tea was imported from the UK and now a plant has been installed in Australia.

The Director-General of the British Food Export Council, Major-General I. S. Harrison, CB, is accompanying the mission as Secretary. The Mission starts work on October 20 and will be moving to Melbourne and Adelaide and then on to Perth, leaving Australia on November 7.

Gullick Dobson heads UK group in £5.3m order for China mines

BRITISH consortium, headed by Gullick Dobson (Export) Ltd. of Wigan, has won an order worth approximately £5.3 million from the mining industry of China. It is the first modern fully mechanised European installation of mining equipment in China and was won against competition from German and Japanese manufacturers. The order is the result of technical and commercial negotiations which began in Peking in March this year. The contract was placed by the Chinese National Technical Import Corporation of Peking.

At Wigan, Sir Geoffrey Howe, accompanied by Mr. Wilf Jones, managing director, and Mr. Fred Small, production director, Gullick Dobson Ltd., inspects a heavy-duty rock ripper for the mining, quarrying and demolition industries.

Gullick Dobson's £3 million share of the order as main contractors involves the manufacture and installation of over 1,000 longwall roof supports, the design of which is based on experience gained in supplying roof supports to the NCB.

The four-leg immediate forward roof supports of 300 yield load tons, some of inclined seam design, will form eight complete longwall installations and comprise the first order for longwall mining equipment received by the UK for China, says Gullick Dobson. The first face is due to be supplied to China in November this year and the complete project despatched by June 1974.

Commenting on this important introduction for Gullick Dobson into what is believed to be one of the largest coal industries in the world, Alan Purdy, managing director of the export company, said: 'There is a great deal of satisfaction in obtaining this order for Britain, in the face of overseas competition, and particularly so after the long technical discussions which have taken place over the past months. We have had up to 10 of our technical people in China for many weeks, and it is pleasing to know that they have succeeded in obtaining these orders after long and thorough, though very friendly, technical and commercial discussions.

'We now look forward to furthering our business, beyond these orders, with our Chinese friends, and their technicians will be well received during their visit to our Wigan factory.'

The other members of the British consortium are Anderson-Mavor Ltd. which is supplying double-ended ranging boom shearers and conveying equipment; Baldwin and Francis Ltd., electrical panels for operating the face machinery; BICC Ltd., all electric cables associated with electrical supply; Brush Transformers Ltd., a member of the Hawker Siddeley Group, transformers; John Davis Ltd., face communications and signalling equipment.

Sir Geoffrey Howe, Minister for Trade and Consumer Affairs, visited Gullick Dobson at Wigan on October 9. The visit followed a DTI export presentation which the Minister made to regional industrialists at Wythenshawe that morning.

During his visit, Sir Geoffrey Howe saw production of the first of the 1,000 longwall roof supports which are part of the order from the Chinese mining industry.

Simon Engineering wins £1m Far East contracts

THREE Simon Engineering companies report four contracts in the Far East to a total value of over £1 million.

Three of the contracts are for the Laem Thong Corporation of Bangkok: Simon-Carves is to supply a travelling pneumatic grain intake plant incorporating ship loading and other facilities under a contract valued at over £300,000; Henry Simon is to design and supply equipment for a combination wheat/maize flour mill to the value of £250,000; Simon-Barron has been awarded a £215,000 contract to design and equip a new animal feed mill.

The fourth contract, won by Simon-Carves, calls for the complete reconstruction of travelling pneumatic grain intake plants and silo dust collection systems for the National Grain Elevator Co. of Jurong Port, Singapore, and is valued at approximately £250,000.

National control system for Belgian electricity

THE Belgian electricity authority, Société pour la Coordination de la Production et du Transport de l'Energie Electrique SA has placed an order valued at over 50 million Belgian francs (£½ million) with Westinghouse Automation of Chippenham. It comprises a control system for the national dispatching of 380 kV power supplies.

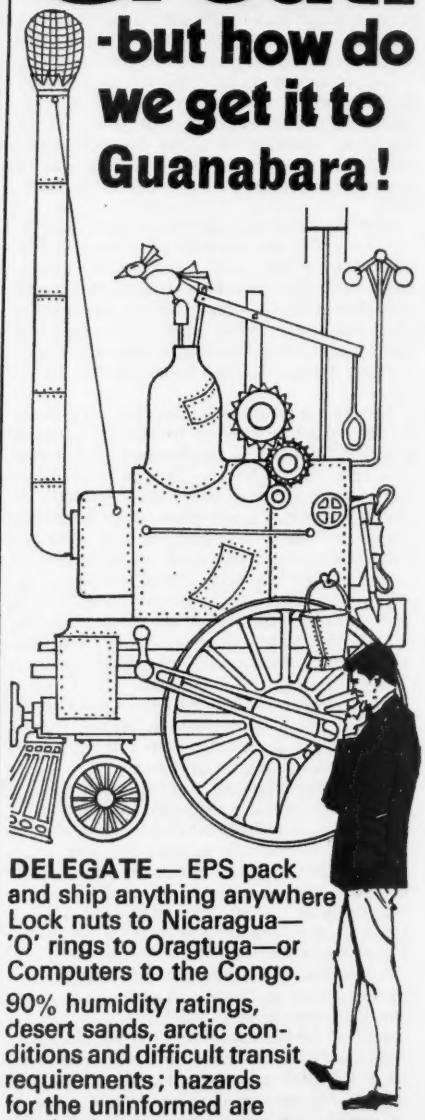
The system will be one of the most advanced dispatching schemes of its type in Europe and will control the nationwide 380 kV supply system and links to surrounding countries and inter-supporting network.

Export success follows display at Montreal

As a result of exhibing in the Montreal Furniture Market under the sponsorship of the British Overseas Trade Board, a small Hertfordshire firm making 'Perspex' furniture hopes to distribute throughout Canada and later set up a manufacturing plant there.

Banks Heeley Plastics Ltd. took part in a recent group display organised by the British Furniture Manufacturers Export Club with BOTB support. In addition to booking orders worth over £16,000, Banks Heeley made contact with a local firm with which it is discussing the possibility of setting up a plant in Quebec.

Great! -but how do we get it to Guanabara!



DELEGATE— EPS pack and ship anything anywhere Lock nuts to Nicaragua— 'O' rings to Oragtuga—or Computers to the Congo. 90% humidity ratings, desert sands, arctic conditions and difficult transit requirements; hazards for the uninformed are routine occurrences to the experts.

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UK/Polish Joint Commission

A MEETING of the United Kingdom/Polish Joint Commission was held in London from September 28 to October 3, 1973. The UK delegation was led by Mr. P. S. Preston, Deputy Secretary, Department of Trade and Industry, and the Polish side by Dr. W. Wisniewski, Deputy Minister of Foreign Trade.

The Commission reviewed the development of trade between the two countries and noted with satisfaction the recent substantial increase in trade, particularly since the beginning of 1973. Progress in industrial, scientific and technological co-operation between enterprises of both countries was also reviewed in accordance with the terms of the Long Term Agreement on the Development of Economic, Industrial, Scientific and Technical Co-operation signed in London in March, 1973.

The Commission examined problems affecting bilateral trade and recognised the need to avoid a persistent imbalance in trade. It was noted that there exists good potential for the continuing development of trade and co-operation between the two countries.

Figures for UK/Polish trade in recent years are as follows:

Value £ million

	1967	1968	1969	1970	1971	1972	1973 Jan./Aug.
UK exports (inc. re-exports) fob	48.7	54.3	55.0	59.7	64.3	75.4	77.9
UK imports cif	56.2	60.5	57.0	63.0	59.9	70.7	61.2

Applications for temporary exemption from import duty

THE Department of Trade and Industry is considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers who consider they are, or will be within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production.

Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed.

Interested parties who wish to make representations should address them to Tariff Division, Department of Trade and Industry, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ, preferably through a trade association, giving the respective reference shown below and stating whether their names may be passed to the applicants for temporary exemption. Representations should be received by November 1.

Tariff heading	Proposed definition for tariff purposes	Applied for as	Exemption required until	Reference
29.03	Sodium 2-methylpropene-3-sulphonate	Sodium methallyl sulphonate	December 31, 1973	14569
29.06	1,1-di-(2-hydroxy-3,5-xylyl)-2-methylpropane	Polyvalent polynuclear phenol	December 31, 1973	14816
29.25	4-Chlorobut-2-ynyl 3-chlorphenyl-carbamate	as in previous column	December 31, 1973	14576
29.34	3-[2-(4-Vinylbenzylamino) ethylamino] propyltrimethoxysilane *mono*hydrochloride	Hydrochloride salt of styrylamino trimethoxysilane	December 31, 1973	14565
33.01	Litsea cubeba oil, not terpeneless	Litsea cubeba oil	December 31, 1973	14716

Middle East: project lists

COPIES of project lists giving details of major development projects in progress or at the planning stage are now available for the following countries:

Abu Dhabi (September 1973), Bahrain (February 1973), Dubai (August 1973), Kuwait (July 1973), Lebanon (August 1972), Oman (October 1973), Qatar (June 1973) and Saudi Arabia (December 1972). **CRE ext. 3419**

Foreign trade Ministers from Bulgaria and Bangladesh pictured last week during calls on Lord Limerick, Parliamentary Under-Secretary of State for Trade. Left: Mr. Ivan Ivanov, Bulgarian Deputy Minister of Foreign Trade, leader of a Bulgarian Chamber of Commerce week's mission to London, Birmingham and Liverpool. Right: Mr. A. H. M. Kamaruzzaman, Bangladesh Minister for Trade, Commerce and Foreign Trade.

TARIFF & TRADE NOTICES

In many cases further information on the notices published on these pages is available from the Department of Trade and Industry. The main branches concerned are: Commercial Relations and Exports (CRE) Divisions, DTI, 1 Victoria Street, London SW1H 0ET (tel: 01-222 7877); and Export Data Branch (EDB), DTI, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (CRE or EDB) and the appropriate telephone extension number. In the Tariff and Trade Notices section countries are grouped by continents as far as possible; they are listed alphabetically on the contents page.

France

VALUE-ADDED TAX ON BEEF—SUSPENSION EXTENDED: A decree in the French *Journal Officiel*, October 4, 1973, announced that the temporary suspension of value-added tax on the retail sale of beef (previously 7.5 per cent) operating since January 1, 1973, has been extended from September 30 to December 31, 1973. Copies of the official French text can be sent on request or seen at Export House. **EDB ext. 423/408/288**

QUALITY STANDARDS FOR ALCOHOLS: A supplement to the *Journal Officiel* of October 2, 1973, sets out the regulations governing the approved methods for laboratory analyses of alcohols and spirits. Copies of the official French text can be sent on request or seen at Export House. **EDB ext. 423/408/482**

PERMITTED SUBSTANCES IN TOILET PREPARATIONS: An *arrêté* in the French *Journal Officiel*, September 9, 1973, establishes that toilet preparations containing poisonous substances in amounts equal to or above those specified in an attached list, will be considered medicaments and subject to the same restrictions. A table annexed to the *arrêté* sets out the substances involved, the percentage amounts allowed and the types of products affected. Copies of the French *arrêté* can be sent on request or seen at Export House. **EDB ext. 423/408/288**

Iran

IMPORT OF FABRICS: The Iranian authorities have declared as authorised for import textiles falling under Brussels tariff numbers 51/04 and 56/07. The import of fabric of man-made continuous fibres for neckties and raincoats will not therefore require the prior approval of the Iranian Ministry of Economy until further notice. This notice amends the information published in *Trade and Industry*, October 4, 1973, page 18. **EDB ext. 420/475**

CUSTOMS TARIFF—ENGLISH TRANSLATION: The final section of the unofficial English translation of the Iran customs tariff using the Brussels nomenclature has been received. British exporters with inquiries should specify the items in which they are interested by BN numbers if possible. **EDB ext. 420/475**

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Ghana

EXCHANGE CONTROL—DEBT REPAYMENTS: Notices published in *Trade and Industry*, February 15, 1973, page 323, and June 21, 1973, page 548, gave details of Bank of Ghana notices 73/3 and BG 73/10. The Bank of Ghana has now issued the following notice:

Notice No. BG 73/16—Payment of arrears—import bills and approved services. The Bank of Ghana announces for the information of importers and other members of the general public that it will release foreign exchange to the commercial banks on October 16, 1973, for the payment of import bills and approved service payments of more than C5,000.00 but not exceeding C10,000.00 in value, which are unpaid for want of foreign exchange and in respect of which the cedi counterpart was paid to the commercial banks on or before February 5, 1972. For the purpose of this announcement, the exchange rates that will be applied will be the following:

a For goods that arrived in Ghana on or before December 27, 1971:
C1.00 = US $0.98 or the appropriate cross-rates in force immediately before December 27, 1971.

b For goods that arrived in Ghana after December 27, 1971, but not later than February 5, 1972:
C1.00 = US $0.78 or the appropriate cross-rates in force immediately after February 5, 1972.

The payment of these bills should be supported with the relevant customs entry form and the original invoice. Further announcements will be made in due course for the payment of other bills in the system. **CRE ext. 3064/3338**

BUDGET (SUPPLEMENTARY PROVISIONS) DECREE 1973: The following notice, published in the *Ghana Gazette*, September 21, 1973, came into force on August 30.

1 Unless the Commissioner responsible for Finance otherwise directs by notice published in the *Gazette*, all departments of State and all statutory corporations shall, notwithstanding anything to the contrary in any other enactment, be deemed to be liable to pay

import duty, excise duty, sales tax and vehicle purchase tax imposed by any enactment.

2 The following enactments are here repealed:

Ghana (Reduction of Taxation) Decree 1966 (NLCD 5)

Customs and Excise Tariff Regulations 1966 (LI 504) (Amendment) (No. 2) Decree 1967 (NLCD 192)

Taxation Act 1970 (Act 330)

Temporary Surcharge on Imported Goods Act 1970 (Act 343)

1970-71 Appropriation Act 1970 (Act 346)

Purchase Tax and Sales Tax Act 1971 (Act 375)

Temporary Surcharge on Imported Goods (Amendment) Act 1971 (Act 376)

Customs (Amendment) Act 1971 (Act 379)

1970-71 Supplementary Appropriation Act 1971 (Act 385)

1971-72 Appropriation Act 1971 (Act 386)

Fees (Petroleum Products and other Articles) (Amendment) Decree 1972 (NRCD 77)

Purchase Tax and Sales Tax (Amendment) Decree 1972 (NRCD 107)

Customs and Excise Tariff (Amendment) Decree 1973 (NRCD 147)

Customs and Excise Tariff (Amendment) Decree 1973 (NRCD 167)

3 The following Instruments are hereby revoked:

Fees (Petroleum Products and other Articles) Regulations, 1965 (LI 389)

Fees (Petroleum and other Articles) Regulations 1967 (LI 557)

Fees (Petroleum Products and other Articles) Regulations, 1969 (LI 614)

Fees (Petroleum and other Articles) (Amendment) Regulations, 1973 (LI 804)

Sales Tax (Exemption) (No. 2) Regulations 1965 (LI 442)

Sales Tax (Exemption) Regulations 1966 (LI 513)

Sales Tax (Exemption) Regulations 1967 (LI 556)

Sales Tax (Exemption) (No. 2) Regulations 1967 (LI 563)

Sales Tax (Exemption) Regulations 1968 (LI 589)

Vehicle Purchase Tax Regulations 1973 (LI 812)

EDB ext. 471/472/473

SECOND-HAND VEHICLES—TARIFF AMENDMENT: The Customs and Excise (Amendment) Decree 1973, published in the *Ghana Gazette*, September 21, 1973, amended with effect from August 30 the Customs and Excise Decree 1972 (see *Trade and Industry*, October 26, 1972, page 167). The Second Schedule to the Customs and Excise Decree 1972 (NRCD 114) relating to second-hand vehicles is amended as follows:

a in paragraph 5, by the substitution for the words 'two and a half years' of the words 'two years';

b by the repeal of paragraphs 6, 7 and 8.

EDB ext. 471/472/473

RIGHT-HAND TRAFFIC: The Right-Hand Traffic Decree 1973 (NRCD 212) which was published in the *Ghana Gazette*, September 4, 1973, gives the date for the change over to right-hand traffic in Ghana as August 4, 1974. **CRE ext. 3064/3338**

South Africa

CUSTOMS TARIFF CHANGE—MUSHROOMS: The following amendment was published in the South African *Government Gazette*, September 14, 1973:

R.1646 BN 20.02: The duty on mushrooms prepared or preserved otherwise than by vinegar or acetic acid is amended from 20 per cent (General) and free (MFN) to 20 per cent.

EDB ext. 471/472/473/462

Malaysia

IMPORT CONTROL (SABAH)—SUGAR: The Malaysian *Government Gazette* has published the following amendment to the Customs (Prohibition of Imports) Order 1969.

The Customs (Prohibition of Imports) (Amendment) (No. 3) Order 1973 amends the Third Schedule to the Order by adding after item 19 the following:

Item	Description	Country
20	Sugar falling within headings 1701 101 1701 102 1701 103 1701 104 1701 501 1701 502 1701 503 1701 504 1702 100 1703 000	All countries including West Malaysia and Sarawak

The Third Schedule refers to goods prohibited from import into the State of Sabah without an import licence.

EDB ext. 469/468/401

CUSTOMS DUTIES (PENANG)—PLASTICS: The Malaysian *Government Gazette* has published the Customs Duties (Penang) (Amendment) (No. 2) Order 1973 which amends the Customs Duties (Penang) Order 1973 Schedule by inserting the following heading numbers:

39.01 610 39.02 810 39.03 350 39.07 101

The Schedule to the Customs Duties (Penang) Order lists the goods on which customs duties are levied. **EDB ext. 469/468/401**

Singapore

IMPORT DUTY CHANGES: The Singapore *Government Gazette* has published the Customs Duties (Amendment No. 5) Order 1973 which amends the Schedule to the Customs Duties Order 1971 as follows:

By abolishing the full and preferential duties on the following codes:

071 300-1	099 041	541 700-3	599 212	673 110	673 510-2
677 010	693 200	693 311	693 312	693 313	694 211-2
694 214-2	697 211	697 212	697 222	697 231	697 232
729 214-2	729 215-2	729 217	729 218	812 300	899 411
899 419	899 702				

By reducing the full and preferential duties on the following codes:

048 421 048 422-1 048 422-9 062 010 073 000 — now 15% or 25 cts per kg

By increasing the full and preferential duties on the following codes:

048 411 048 419 048 423	now 15% or 25 cts per kg
629 101 629 102 629 103 629 104 629 111	now $3.10 per kg
629 105 629 106 629 107 629 108 629 110 629 112 629 113	now $4.65 per kg
629 109	now 50 cts
629 114	now 25 cts

EDB ext. 401/468/469

The lists of Tariff, Customs and Import Regulations changes in overseas countries published in this section of *Trade and Industry* sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view. Items which fall into this category are preceded by the letters rtn. Readers should note that this prefix signifies that the words are registered as trade marks in the United Kingdom but that in the present context are assumed to refer generally to products of the descriptions stated in brackets. While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

Australia

TARIFF CHANGES: Details are given below of changes made in the Australian Customs Tariff by customs tariff proposals 14 and 15 (1973) which came into effect on September 28 consequent upon the following Tariff Board inquiries:

Acetone derivatives; ethyl methyl keyton

Metal plates etc. for printing purposes

Machine tools for working stone, etc. and wood, etc.; pneumatic hand tools etc.

NZAFTA—machine tools for working wood, etc.

Chain saws (Dumping and Subsidies Act).

ALTERATIONS TO PART II, OF THE FIRST SCHEDULE TO THE CUSTOMS TARIFF 1966-72

Tariff item	Goods	Rates of duty: General	Rates of duty: Preferential
	Omit sub-item 29.04.5, substitute the following sub-item:		
29.04.5	4-methylpentan-2-ol; 2-methylpentane-2, 4-diol	40%	40%
	Omit sub-items 29.13.2 and 29.13.3, substitute the following sub-items:		
29.13.2	Mesityl oxide; ethyl methyl ketone	6¾%	6¾%
29.13.3	isoButyl methyl ketone; diacetone alcohol	40%	40%
	Omit sub-item 84.06.7, substitute the following sub-item:		
84.06.7	Air-cooled spark ignition engines having a power not exceeding 7.46 kilowatts, and parts therefor, not including motor-cycle engines or goods falling within a preceding sub-item of this item; air-cooled internal combustion piston engines of a kind used solely or principally with chain saws of a kind falling within sub-item 84.49.1, not including parts of a kind ordinarily used with engines of a kind falling within paragraph 84.06.71 or 84.06.91:		
84.06.71	Engines, not including parts therefor or goods falling within paragraph 84.06.73	65%, or, if higher, $13 each	32½%, or, if higher, $13 each, less 32½%
84.06.72	Parts of a kind ordinarily used with engines of a kind falling within paragraph 84.06.71	42½%	25%
84.06.73	Air-cooled internal conbustion piston engines of a kind used solely or principally with chain saws of a kind falling within sub-item 84.49.1, not including parts of a kind ordinarily used with engines of a kind falling within paragraph 84.06.71 or 84.06.91	To and including September 27, 1976—42½%; From and including September 28, 1976—35%	To and including September 27, 1976—42½% From and including September 28, 1976—35%
	Omit sub-item 84.34.3, substitute the following sub-item:		
84.34.3	Metal plates prepared for photo-engraving:		
84.34.31	Of zinc or magnesium	25%	15%
84.34.39	Of other materials	6¾%	6¾%
	Omit items 84.46 and 84.47, substitute the following items:		
84.46	*Machine-tools, for working stone, ceramics, concrete, asbestos-cement and like mineral materials or for working glass in the cold, other than goods falling within item 84.49	35%	35%
84.47	*Machine-tools for working wood, cork, bone, ebonite (that is to say, vulcanite), hard artificial plastic materials or other hard carving materials, other than goods falling within item 84.49:		
84.47.1	Machine-tools, as follows: (a) band saws designed to operate with band wheels exceeding 1,250 millimetres in diameter; (b) circular sawing machines designed to operate with saw blades exceeding 750 millimetres in diameter; (c) circular sawing machines with two or more blades arranged for cutting simultaneously; (d) debarking machines designed primarily to remove bark from logs; (e) frame sawing machines; and (f) gang sawing machines	25%	25%
84.47.9	Other	35%	35%
	Omit sub-items 84.48.2, 84.48.3 and 84.48.9, substitute the following sub-items:		
84.48.2	Chucks not falling within sub-item 84.48.1; tool holders, hand held, of a kind driven by flexible shafts	6¾%	6¾%
84.48.9	Other	The rate of duty set out in column 3 in the tariff classification that applies to a machine that is higher rated than a machine of another kind with which that accessory, part, component or constituent is used, is suitable for use or forms a part	The rate of duty set out in column 3 in the tariff classification that applies to a machine that is higher rated than a machine of another kind with which that accessory, part, component or constituent is used, is suitable for use or forms a part
	Omit item 84.49, substitute the following item:		
84.49	*Tools for working in the hand, pneumatic or with self-contained non-electric motor:		
84.49.1	Chain saws other than of the pneumatic or hydraulic type	To and including September 27, 1976—42½%; From and including September 28, 1976—35%	To and including September 27, 1976—42½%; From and including September 28, 1976—35%
84.49.9	Other	6¾%	6¾%

A £35,000 order for television service equipment to assist the conversion to colour broadcasting in Australia in 1975 has been won by Labgear Ltd., Cambridge. The order includes 520 colour bar generators, which are used by service engineers when setting up and testing colour receivers. The order was received from Technico Ltd., Sydney, a Pye subsidiary. Mr. Ken Buckley (left) sales manager of Technico's instruments division, is seen during a visit to the Labgear factory with (from the left) Mr. Dennis Greer, Labgear's new export manager, Mr. Bill Shepherd, general sales manager, and Mr. S. R. R. Kharbanda, managing director, examining one of the generators.

These rates of duty will, of course, be reduced by 25 per cent (see *Trade and Industry*, August 23, 1973).

In regard to the Tariff Board dumping inquiry on chain saws, it was confirmed that chain saws (old tariff item 84.49.31 now 84.49.100) including such goods without bar and/or chain have been dumped and dumping duty has been imposed retrospectively from June 15, 1970. **EDB ext. 468/469/401**

Fiji

PREFERENTIAL TARIFF TO BE ABOLISHED: The Fiji Government is to make substantial changes in the present two-line, preferential and general tariff system. On January 1, 1974, it will introduce a single-line tariff and abolish preferential tariffs which give most Commonwealth countries an advantage. It is expected that in most instances the new tariff will be between the present preferential and general rates.

The format of the working tariff will remain the same but the import duty columns of general and preferential will be replaced

(*continued on page 136*)

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FIJI
continued

by Customs and Fiscal Duty columns. The Port and Customs Service Tax (generally 5 per cent of cif value) is to be incorporated with either the Customs or Fiscal Duty.

Further information will be published when it is received.

EDB ext. 469/468/401

United States

IMPORT DATA: *Trade and Industry*, October 4, announced that the implementation of new regulations affecting imported merchandise had been postponed and that the Tariff Commission would be publishing *proposed* regulations and giving an opportunity for interested parties to comment. The proposals have now been published and are the same as the regulations which were to come in effect on October 1. Comments should be submitted to the Tariff Commission by October 29 (FR 28.9.73). **CRE ext. 5397**

Barbados

IMPORT LICENSING: The Barbados authorities have issued the Miscellaneous Controls (General Open Import Licence) Regulations 1973. The following items have been added to the list of goods requiring a specific import licence.

BTN	Commodity
7.01	Onions
9.01	Coffee
9.02	Tea
16.04	Salmon, canned
18.05	Cocoa powder, unsweetened
18.06	Chocolate and other food preparations containing cocoa other than chocolate confectionery
19.02	Preparations of flour, meal, starch or malt extract, of a kind used as infant food or for dietetic or culinary purposes, containing less than 50 per cent by weight of cocoa
19.05	Prepared foods obtained by the swelling or roasting of cereals or cereal products (puffed rice, corn flakes and similar products)
20.02	Pigeon peas, preserved by vinegar, etc. Baked beans
21.05	Soups and broths in liquid, solid or powder form; homogenised composite preparations
21.07	Baby foods, etc.
22.09	Aromatic bitters ('Angostura')
25.23	Cement
36.06	Matches
61.01	Men and boys' outerwear, jackets and pants not knitted
61.02	Women's, girls' and infants' outer garments
87.02	Motor vehicles for the transport of persons (ie motor cars, buses, mini-buses)

The following items have been removed from the list:

SITC	Commodity
022.1	Milk (including skim milk), evaporated or condensed (in liquid or semi-liquid form)
732.11	Motor cars
732.21	Buses (complete assembled)
732.22	Buses (packed semi-knocked down or completely knocked down)

EDB ext. 7312/474/476

Jamaica

ADDITIONAL SALES TAX ON MOTOR CARS: The Jamaican Provisional Collection of Tax Act 1973 states that an additional sales tax will be payable in addition to the retail sales tax on motor cars at the rate of 131¼ per cent of the difference between the import duty on July 31, 1973, and any lesser duty imposed after July 31, 1973. British exporters can obtain a copy of the Act from OTAR Section, Export Data Branch. **EDB ext. 7312/474/476**

INDUSTRIAL INCENTIVES LAW—ALUMINIUM FOIL: The Jamaican Minister of Industry and Tourism is considering whether aluminium foil should be declared an 'approved product' for the purposes of the Industrial Incentives Law 1956.

'Approved manufacturer' of this product will enjoy income-tax relief, duty-free imports of building materials, plant, machinery, etc., and other concessions. Applications for the status of 'approved product' and 'approved manufacturer' are processed by the Jamaica Industrial Development Corporation, 4 Winchester Road, Kingston 10, Jamaica (PO Box 505). It would be appreciated if firms writing to the Corporation would copy their initial correspondence to the British High Commission, Commercial Department, PO Box 393, Kingston, Jamaica. **CRE ext. 3572**

IMPORT LICENSING—STEEL PURLINS: The Jamaican authorities announced in notice No. 2868 of October 2, 1973, that an import licence is now required for steel purlins.

EDB ext. 7312/474/476

Trinidad and Tobago

AID TO PIONEER INDUSTRIES ORDINANCE—WOODEN FURNITURE: Manufacture of wooden furniture has been declared a 'pioneer product' under Trinidad and Tobago's Aid to Pioneer Industries Ordinance 1950. Applications for 'pioneer' status are processed by the Trinidad Industrial Development Corporation, Salvatori Buildings, Independence Square, Port of Spain, Trinidad (PO Box 949). It would be appreciated if firms writing to the Corporation would copy their initial correspondence to the British High Commission, Commercial Section, PO Box 778, Port of Spain, Trinidad. **CRE ext. 3572**

Guyana

PURCHASE TAX ON MOTOR CARS: Government of Guyana Orders 89 and 96 of 1973 dated August 25 and September 7, 1973, respectively, impose purchase tax on the retail selling price of motor cars entered for use within Guyana on or after August 1, 1973. The two classifications are as follows:

cars of 1800 cc and above at the rate of 27 per cent

cars of less than 1800 cc at the rate of 15 per cent.

EDB ext. 7312/474/476

CONSUMPTION TAX: Government of Guyana Order 97 of September 14, 1973, subjects a further range of goods to a local consumption tax. **EDB ext. 7312/474/476**

Chile

DUTY CONCESSIONS: The Chilean authorities have introduced duty concessions as follows:

Tyres and inner tubes. Decree 1108/73 suspends the *ad valorem* cif duty on tyre cases, inner tubes and inner tube covers under tariff headings 40.11.01.01, 40.11.01.99 and 40.11.99. This makes the importation of these items duty free.

Light soda ash. Decree 1465/73 reduces the duty on light soda ash (tariff number 28.40.02.03) to 10 per cent *ad valorem* cif until June 30, 1974.

Duplex paper. Decree 1536/73 allows duty-free imports of duplex paper (tariff number 48.01.99) until November 30, 1973.

EDB ext. 474/476/7312

EQUIPMENT FOR TRAILERS—NEW HEADING: Chilean Decree 929/73 creates a new tariff description as follows:

Tariff no.	Description	Duty specific	*Ad val* cif
87.14.80.01	Axles, turntables, braking equipment, artillery wheels, jack supports, coach pole ends, parts and pieces for axles and hooks for trailers	Free	50%

EDB ext. 474/476/7312

CRE Commercial Relations and Exports Divisions
Department of Trade and Industry
1 Victoria Street, London SW1H 0ET
Tel. 01-222 7877

EDB Export Data Branch, Export Services Division
Department of Trade and Industry
Export House, 50 Ludgate Hill, London EC4M 7HU
Tel. 01-248 5757

COMMUNITY TRANSIT

Anglo-Danish trade—documentation of goods moving under transitional arrangements to maintain free trade

by HM Customs and Excise

THE United Kingdom has concluded a bilateral agreement with Denmark under Article 6 of Regulation (EEC) 542/69 which dispenses with the requirement for Community transit documentation for goods traded direct between the two countries which are the subject of a valid declaration on origin and drawback as laid down in the Anglo-Danish transitional arrangements. The relaxation does not apply in cases where the procedure for internal Community transit is compulsory under Community rules.

This agreement, the text of which is reproduced below, gives formal effect to the arrangements which have been in operation since April 1, 1973.

The Agreement applies to the Channel Islands in the same way as it applies to the United Kingdom.

Agreement on trade documentation

ARTICLE 1

In accordance with Article 6 of Council Regulation (EEC) No. 542/69 of March 18, 1969 this Agreement on simplification of the procedure for Community Transit shall apply for goods traded between the United Kingdom and Denmark.

ARTICLE 2

This agreement shall apply to goods:

which meet the conditions for duty-free entry in accordance with the Anglo-Danish transitional arrangements,

which are the subject of a declaration on origin and drawback referred to in Article 13 of the said arrangements, and

for which the procedure for internal Community Transit is not compulsory as a result of Community rules

when travelling direct by sea or air, and directly consigned without reloading, between the United Kingdom and Denmark or vice versa.

ARTICLE 3

When a valid declaration referred to in Article 13 of the Anglo-Danish transitional arrangements is presented to the Customs authorities of the importing country for goods referred to in Article 2, such goods shall be considered to have the character of Community goods and no further documentation as prescribed by Article 13, paragraph 2 of Regulation (EEC) No. 385/73 of January 19, 1973 shall be required by the said authorities.

ARTICLE 4

The declaration referred to in Article 13 of the Anglo-Danish transitional arrangements shall be taken to indicate, for the purposes of Article 8 of Regulation (EEC) No. 269/73 of January 31, 1973 and Article 11 of Regulation (EEC) No. 648/73 of March 1, 1973, that the State of Despatch of the goods is the country from which they are exported and the State of Destination the country to which they are consigned.

ARTICLE 5

The provisions of Regulation (EEC) No. 2315/69 of November 19, 1969 shall apply, where appropriate, to goods traded between the United Kingdom and Denmark or vice versa.

ARTICLE 6

This agreement is valid until the expiry of the Anglo-Danish transitional arrangements.

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New EC legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is now published in English and copies may be obtained from HMSO. Information about the items listed, in so far as exports are concerned, is available from Department of Trade and Industry, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757 ext. 7174/482/408). Other information may be obtained from the reference point given at the end of the item.

COMMON AGRICULTURAL POLICY: The texts of the following Regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

Cereals. Regulation (EEC) 2632/73 amending Regulation (EEC) 1968/73 laying down general rules to be applied in the event of the cereals market being disturbed. (*Official Journal* L272, September 29, 1973)

Fruit and vegetables. Regulation (EEC) 2680/73 fixing the standard average values for citrus fruits to be applied during the periods at the beginning of the 1973/74 importing season. (*Official Journal* L275, October 2, 1973)

COMMERCIAL POLICY—IMPORTS OF YARN OF JUTE OR COTTON: The *Official Journal of the European Communities* L272, September 29, 1973, contains the texts of the following:

Regulation (EEC) 2630/73 establishing a system of permits covering the import of yarn of jute from non-Member countries into the United Kingdom.

Regulation (EEC) 2631/73 providing for the import of cotton yarn into the United Kingdom from non-Member countries.

Further information: Department of Trade and Industry, Chemicals and Textiles Division, Millbank Tower, Millbank, London SW1P 4QU (tel. 01-834 4422 ext. 530 (jute) ext. 711 (cotton)).

CUSTOMS REGULATIONS—COMMUNITY TRANSIT: The *Official Journal of the European Communities* L271, September 28, 1973 contains the text of Regulation (EEC) 2625/73 amending Regulation (EEC) 2588/69 establishing the list of airline companies to which the Community transit guarantee waiver applies.

Further information: HM Customs and Excise, General Inquiry Office, King's Beam House, Mark Lane, London EC3R 7HE (tel. 01-626 1515).

UNCTAD GENERALISED PREFERENCES SYSTEM—TEXTILE PRODUCTS: The *Official Journal of the European Communities* L272, September 29, 1973 contains the texts of the following Regulations:

Regulation (EEC) 2628/73 opening, allocating and providing for the administration of Community tariff quotas for the period October 1 to December 31, 1973 for certain of the textile products falling within tariff headings 55.05, 55.09, 56.05, 56.07, 60.03, 62.02 originating in developing countries

EEC Information Unit

The DTI's EEC Information Unit helps firms of all types and sizes by answering general questions about the effects of entry into the EEC and by guiding them where necessary to more specialised information sources. New customers are always welcome, particularly firms new to EEC questions.

The Unit's address is: EEC Information Unit, Department of Trade and Industry, 1 Victoria Street, London SW1H 0ET. Tel: 01-222 7877 ext. 3591 for publications; extensions 5377, 5479, 5480 or 3579 for questions on EEC matters.

Regulation (EEC) 2629/73 establishing preferential tariffs for the period October 1 to December 31, 1973 in respect of certain of the textile products falling within tariff headings 54.05, 55.05, 55.06, 55.07, 55.08, 55.09, 58.04, 58.10, 60.01, 60.02, 60.04, 60.05, 60.06, 61.01, 61.02, 61.03, 61.04, 61.05, 62.01, 62.03, 62.04 originating in developing countries.

EEC-Egypt Agreement

THE following amends the paragraph dealing with the Enlargement Protocol to the Agreement, which appeared on pages 22/23 of *Trade and Industry*, of October 4, 1973.

EEC-Egypt Agreement: Enlargement Protocol

The Enlargement Protocol which will govern the conditions under which the provisions of the Agreement will apply to the UK, Ireland and Denmark, has the following principal elements in respect of the UK:

The tariff provisions of the Agreement will be phased in by the UK as fast and as far as can be done without treating Egypt more favourably than the UK treats the Six. This means, for example, that the first move by the UK (on November 1) towards the 55 per cent preference to be given by the Six on most industrial products on January 1, 1974, will be a reduction of 20 per cent of the full rate, the amount by which duties on imports from the Six were reduced by the UK on April 1, 1973. Further reductions will be made to bring us into line with the original Six Member States. For further information on tariff reductions, contact DTI Tariff Division (tel: 01-222 7877 ext. 3713).

The UK will eliminate all quantitative restrictions on imports except those on textile products covered by the GATT Long Term Agreement.

The annual UK share of tariff quota for petroleum products will be 150,000 tonnes, and for products under tariff heading 55.09, 650 tonnes.

Egypt will **eliminate the difference between the duties charged on** imports from the Six and duties charged on imports from the new Member States according to the following time-tables: from November 1, 1973—20 per cent; from January 1, 1974—40 per cent; and from January 1, 1975—100 per cent.

Common Market Law of Competition

by CHRISTOPHER BELLAMY, M.A.(OXON.) *at the Middle Temple and Gray's Inn, and of the South Eastern Circuit, Barrister*
and GRAHAM CHILD, M.A.(OXON.) *Solicitor of the Supreme Court*
Consultant Editor:
JEREMY LEVER, M.A.(OXON). *One of Her Majesty's Counsel, Fellow of All Souls College, Oxford*

The book sets out, first, to explain and analyse the relevant rules in a way familiar to readers of British textbooks. The application of the rules is then illustrated by reference to specific decisions, the implications of which are discussed. Points of doubt and difficulty are indicated. The book is fully referenced and indexed, and provides not only a ready guide to the body of the relevant law but also to the sources from which that law is derived. The relevant Treaty provisions, regulations, draft regulations and announcements of the Commission are included in extensive Appendices.
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Consumer Minister on 'far-reaching changes in County Court procedure'

SIR Geoffrey Howe, Minister for Trade and Consumer Affairs, spoke to the Consumer Council of Greater Manchester on October 9 about changes which will affect the consumer who becomes a litigant.

Sir Geoffrey said: 'First, there are new, simpler forms and, for the guidance of the litigant unfamiliar with them, specimen claim forms and a handbook written by a former registrar. On the form is a space for a request for arbitration—on which I shall have more to say later. Secondly, most consumer complaints will find that they can bring "default" actions for a specific sum of money: this simplifies procedure, especially if the defendant fails to turn up. Thirdly, there was introduced in March 1972 the "pre-trial review" held in private by the registrar. This has many uses. It may in the first place, be used to reconcile the aggrieved consumer and the defendant. From the point of view of consumers without legal representation the review is useful in allowing the main points of the argument to be isolated. At the review the registrar can also decide whether to make use of the fourth, and most significant reform—the arbitration procedure to which I referred a few moments ago.

'Arbitration may be ordered in cases where the claim is below £75, even where one party objects, as long as fraud is not involved. In other cases the consent of both parties is required. The arbitrator will usually be the registrar who made the reference, or the judge in larger cases.

'If the parties agree, the arbitrator can be any suitable person they choose to nominate who consents to act. Unless the case requires very specialised knowledge, for example a complicated electronic problem, it may be wiser to accept the registrar or judge as arbitrator because they have experience in trying actions. The registrar as well as the judge can also request expert advice on disputed matters of a technical nature. Arbitration will be held in private, with strict rules of evidence suspended. The judgement when made will be enforceable as an ordinary judgement of the court, with appeal only on matters of law.

Provisions regarding costs

'The final, but by no means the least important, reform which a party to a County Court action is likely to encounter is the change in the provisions regarding costs. Costs will not normally be awarded in cases involving less than £75.

'One approach that may be worth developing further has been illustrated by the provisions of the Criminal Justice Act 1972. For Section 1 of that Act enables a criminal court which convicts a person of an offence (which has involved the infliction of certain kinds of damage) to order the payment of what amounts to civil compensation to the victim. This power is of particular importance in the consumer protection field. For it enables the consumer to be assisted directly to secure redress as a result of the work of public officials, in the person of Weights and Measures inspectors, in the enforcement of the criminal law. And it avoids the necessity for a separate civil action to review damages.

'The Fair Trading Act also introduces an important legal innovation, which will operate initially in the consumer protection field but may be capable of wider application, for the Director General of Fair Trading is enabled, by Part III of the Act, to seek what is, essentially, an injunction against traders who persist in disregarding their legal obligations whether civil or criminal. This power owes something to Scandinavian and American precedents—and a little to the powers of our own Attorney General to act on behalf of the public in a relator action. If the Director General can show that a trader has, on several occasions, been convicted of criminal offences or has committed breaches of his civil liabilities, then the Director General will be able, in the first instance, to seek from the trader an undertaking to mend his ways. And if no such undertaking is forthcoming, then the Director General will be able to seek an equivalent order from the Restrictive Practices Court or the County Court.'

'What's cooking?' Mr. Chataway seems to be asking. Nothing so appetising as mulligatawny or asparagus soup, but textiles brewing in dyes made by Yorkshire Chemicals Ltd,. Leeds. The Minister for Industrial Development opened an office and laboratory extension for the company and laid a foundation stone for a new dye standardisation unit. The company—founded in Leeds in 1900 and employing over 1,000 people at home and overseas—exports over half its production of dyes and adhesives. Seen accompanying the Minister in the technical services laboratory is chief colourist David Blackburn (right).

First factory for Pen-y-Fan industrial estate

ABINGDON Carpets Ltd. are to build a new factory on the Pen-y-fan Industrial Estate, Abercarn to accommodate a foam backing plant and provide additional tufting capacity.

Construction of a new 64,000 sq. ft. factory has started and the company hope to start production in January 1974.

Employment will be provided initially for 55 people of whom 46 will be men. Following completion of Phase II which will involve carpet dyeing and twisting and heat setting of nylon carpet yarn, another 25 jobs will arise.

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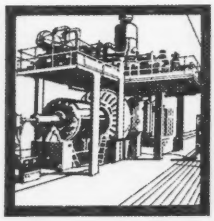
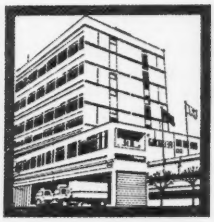
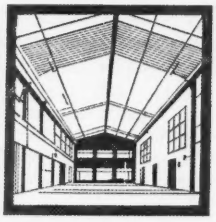




GRANTS OF UP TO 22% ON THE COST OF NEW BUILDING

LOW INTEREST LOANS FOR PROJECTS INCREASING EMPLOYMENT



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Yorkshire & Humberside tel: Leeds 38232 (STD code 0532)
East Midlands tel: Nottingham 46121 (STD code 0602)
West Midlands Birmingham, tel: 021-632 4111
South West tel: Plymouth 21891 (STD code 0752) or Bristol 291071 (STD code 0272)
Eastern Region London, tel: 01-828 6271 ext. 104 or 61
London & South East London, tel: 01-828 4355 ext. 50
Northern Ireland tel: Belfast 34488 (STD code 0232) or London 01-493 0601

ISSUED BY THE DEPARTMENT OF TRADE AND INDUSTRY

Work starts on new advance factories

CONTRACTS worth nearly half a million pounds have been awarded by the English Industrial Estates Corporation for the construction of six advance factories in the Northern Region.

At Alnwick in Northumberland a 5,000 sq. ft. unit is being built by J. G. Green & Sons Ltd., of Warkworth. The factory has been designed by Estates Corporation staff and the quantity surveyors are J. B. Wearmouth & Newbigin of Newcastle. Work is expected to start almost immediately and the premises should be ready for occupation by late spring of 1974.

A contract has been awarded to Stanley Miller Ltd. of Newcastle for the construction of two factories, both of 15,000 sq. ft. on the Nelson Industrial Estate, Cramlington, Northumberland. Architects are Richard Turley Associates and the quantity surveyors are John G. Hellawell & Partner. Work will start during October and the factories should be completed in the summer of 1974.

On the Hartlepool Industrial Estate, Co. Durham, a 15,000 sq. ft. unit is to be built by G. W. Lazenby & Co. Ltd. of Ferryhill. Architects are Hawkins Heath and Nelson and the quantity surveyors are John G. Hellawell & Partner. The factory will be ready for occupation next summer.

In Cumberland, Border Engineering Contractors Ltd. of Whitehaven are to build two factories, one of 10,000 sq. ft. and the other of 15,000 sq. ft. on the Lillyhall Industrial Estate, Workington. Architects for this project are Ian Ward Associates of Carlisle and the quantity surveyors are A. L. Hutchinson & Associates also of Carlisle. Work will start during October and these factories will also be ready for occupation in the Summer of 1974.

Mr. B. G. Syrett, Director General of the Estates Corporation, commented, "The shortage of structural steel has delayed the start of our advance factory programme. These six units are the first to get under way but we expect to let contracts for a further nine factories before the end of the month'.

Any inquiries regarding these factories should be addressed to the Regional Commercial Manager at the following offices or to any office of the Department of Trade and Industry.

Mr. D. Gough, North Region, Team Valley Estate, Gateshead. Tel: Low Fell 876071 (Alnwick & Cramlington.)

Mr. R. Lonsdale, Stockton Region, North Tees Estate, Stockton-on-Tees, Tel: Stockton 67437 (Hartlepool)

Mr. J. A. McBain, Cumberland Region, Salterbeck Estate, Workington. Tel: Harrington 469 (Lillyhall)

New factory at Newtown

DOWTY Electrics Ltd. are to occupy a new factory of 6,000 sq. ft. built by the Mid-Wales Development Corporation at Newtown.

The new factory has been built on the Vastre Estate—which is the second major industrial estate to be developed by the Corporation.

Dowty Electrics, a member of the Dowty Group of Companies who have their headquarters at Cheltenham, move into their new factory in November. They will be recruiting staff immediately and initially will be providing 40 jobs for men and women.

The company manufactures electrical equipment for the aerospace industry, railways, naval vessels, armoured fighting vessels and industrial applications, and its development at Newtown is to meet rapidly growing demands on the home and export markets.

This is the second Dowty company to establish in Newtown. Dowty Seals Ltd. already occupy a factory of 10,000 sq. ft. on the Dyffryn Estate—which was the first industrial estate to be developed by the Corporation. The company already provides employment for 50 people and is expected to more than double the size of its labour force by the end of 1974.

Extension to Merthyr Tydfil advance factory

THE Welsh Industrial Estates Corporation announce that a contract has been placed for the construction of an extension of 23,455 sq. ft. to Advance Factory No. 4, Merthyr Tydfil at Abercanaid for O. C. Summers (Holdings) Limited. O. C. Summers took occupation of this factory in June, 1973, for the manufacture of flexible tubing and similar products.

The extension is scheduled for completion next April. Architects are Powell, Alport and Partners, Cardiff. and the building contractors are Shepherd Construction Limited, Treforest.

Industrial survey in West Belfast

As part of its overall industrial development plans for West Belfast the Northern Ireland Ministry of Commerce has ordered a major industrial survey of the area. The survey is to be carried out by Inbucon/AIC Management Consultants Limited and it will be the task of the survey team to examine the strengths and weaknesses of the area in terms of local skills and physical resources, assess the types of industry and products to which they are most applicable and to identify and investigate specific projects for location in or adjacent to the area.

The survey will not be confined to determining how employment prospects might be enhanced through the introduction of new industry. The consultants will be looking closely at existing industry in West Belfast and assessing its potential for expansion and improvement.

Committee to promote Welsh/German trade

A COMMITTEE to promote and develop two-way trade between Wales and the Federal Republic of Germany has been formed in this country by the German Chamber of Industry and Commerce in the United Kingdom.

Chairman of the new organisation, whose full title is the Regional

(continued on next page)

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Industrial and commercial property

'Under our scheme of selective financial assistance for expansion projects, the Northern Region has benefited from more positive decisions than any other region and from a comparably high proportion of the new jobs secured,' said Mr. Anthony Grant, Parliamentary Under-Secretary of State for Industrial Development, during his recent four-day visit to the Northern Region and Scotland. The Minister (centre) is seen here with Mr. John Hobbs, director, North of England Development Council (left), and Mr. Ronald Dearing, director, Northern Region, DTI. Last year was a record for the Northern Region in the number of factories and the amount of factory space committed to new occupiers by the English Industrial Estates Corporation. (Photo by courtesy of 'Teesside Executive'.)

WALES/GERMANY TRADE COMMITTEE
continued

Committee of Wales of the German Chamber of Industry and Commerce in the United Kingdom, is Mr. Richard Englert, managing director of Thyssen (Great Britain) Ltd., Llanelli, since it was formed in 1954. The two other members of the committee are Mr. W. Emrys Evans, regional director of the Midland Bank in Cardiff, and Mr. J. C. Evans, branch manager of the Sun Alliance and London Insurance Group in Swansea.

The committee has two basic functions—to channel advice and the benefits of practical experience to companies in Wales seeking to export to Germany and to encourage German trade with Wales.

Metrication in agriculture, horticulture and associated industries

'GOING Metric: a Programme for Farming' the Metrication Board's Report on metrication in agriculture, horticulture and associated industries, was published on October 9 and copies are available from the Information Office, Metrication Board, 22 Kingsway, London WC2B 6LE.

In October 1972 Mr. James Prior, then Minister of Agriculture, Fisheries and Food, announced on behalf of the Agricultural Departments that the Government would support a metrication programme for agriculture and horticulture centred in the farming year 1975-76. At the Minister's request the Metrication Board embarked on a round of consultations with the industries and trades concerned about a co-ordinated programme on the basis of this timing. The consultation has now been completed.

The report reviews the stages which preceded and followed the Minister's announcement, sets out the broad programme centred on the farming year 1975/76 and indicates some aspects which will require attention in the future. In a foreword to the report the Minister of Agriculture, Fisheries and Food, Mr. J. B. Godber, points out that it contains firm and agreed arrangements for carrying out the changeover in a planned and orderly fashion.

New VAT booklets

A REVISED edition of Notice No. 700 (VAT: General Guide) has been issued by HM Customs and Excise. Where the contents are materially different from the earlier Notice the page is marked by a vertical line at the side of the text.

Also issued is VAT Notices Amendment Leaflet No. 2 which gives detail of changes in Notices No. 701 (VAT: Scope and coverage), No. 709 (VAT: Hotels and Catering) and No. 711 (VAT: Second hand cars).

Changes in Notice No. 701 announced in the amendment leaflet include the zero-rating of peat sods, peat briquettes and other forms of peat sold or used solely as a fuel. All other forms of peat, for example moss peat and peat sold for horticultural or agricultural use, remain standard rated.

The main change in Notice No. 709 arises from the amendment to the law relating to holiday accommodation. The scope of the exemption in relation to catering in schools and hospitals is set out in more detail.

Notice No. 711 is amended to explain more fully the VAT situation on the importation of used cars.

Revised Notice No. 700 and Amendment Leaflet No. 2 are both available from any Customs and Excise local VAT office.

Patents endorsed 'Licences of Right'

UNDER Section 35 of the Patents Act, 1949 the following patents were endorsed 'Licences of Right' on the dates specified.

Number	Grantee	Subject-matter
September 27, 1973		
1,026,883	Anker-Werke Aktiengesellschaft	Coin sorting apparatus for use with change-dispensing cash register
1,128,416	I.S.I. Manufacturing Inc.	Toggle clamp
1,166,448	Leland Francis Blatt	Toggle action jaw-type gripper
1,205,097	Leland Francis Blatt	Rollers
1,221,037	Leland Francis Blatt	Toggle action jaw-type gripper
1,230,070	Leland Francis Blatt	Vacuum cup type work gripping means
1,251,771	Leland Francis Blatt	Workpiece handling apparatus
1,297,228	Leland Francis Blatt	An exhaust silencer assembly
September 28, 1973		
1,222,906	Agfa-Gevaert Aktiengesellschaft	Improvements in and relating to photographic printing apparatus
October 2, 1973		
1,040,639	Standard Telephones and Cables Ltd.	Electronic switching telephone system
1,150,594	International Standard Electric Corporation	Circuit arrangement to supervise the loop resistance of a telecommunication
1,159,149	Coal Industry (Patents) Ltd.	Rotary cutting heads for mining machines
1,227,711	International Standard Electric Corporation	Synchronising system for data processing equipment clocks
1,227,898	International Standard Electric Corporation	Electro magnetic crosspoint switching array
1,241,363	International Standard Electric Corporation	Data processing systems duplicated for reliability purposes
1,239,686	International Standard Electric Corporation	Self-seeking electronic switching network
1,247,750	Standard Telephones and Cables Ltd.	Cable connector
1,261,232	James Skirving Pratt	Measuring device for safety distances between moving vehicles
1,267,096	International Standard Electric Corporation	Image storage cathode ray tubes
1,267,727	Standard Telephones and Cables Ltd.	An electrographic apparatus
1,277,974	International Standard Electric Corporation	Push-button switch keyset

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on Patents Form No. 45 within two months after the date of endorsement.

Awards for saving life at sea

HER Majesty the Queen has been graciously pleased, on the recommendation of the Secretary of State for Trade and Industry, Mr. Peter Walker, to approve the award of the Queen's Commendation for brave conduct to the following members of the crew of ss *Liverpool Bay* in recognition of their actions during the rescue of five survivors from the French vessel *Mont Laurier* which was in distress in mid-Atlantic Ocean on January 14, 1973:

Mr. Ronald Carson McClelland, Chief Officer;
Mr. Peter Malcolm Watt, Senior Second Officer.

In addition, the Secretary of State for Trade and Industry has made the following award:

to Captain Jack Bentley, master of *Liverpool Bay*, a piece of plate.

International Code of Signals 1969

THE Intergovernmental Maritime Consultative Organisation has decided that the International Code of Signals 1969 shall be amended, as from January 1, 1974, to provide for additional signals for the purpose of routeing of ships and for communicating.

An amendment to the United Kingdom edition of the Code, entitled *Amendment List No. 2*, was published on October 16 and is available at HM Stationery Office, 49 High Holborn, London WC1V 6HB, or branches, or through booksellers, price 6½p (price by post 9½p).

Public inquiry into loss of mv 'Burtonia'

MR. Michael Heseltine, Minister for Aerospace and Shipping, has ordered a Formal Investigation (which will be held in London) into the circumstances surrounding the foundering of the mv *Burtonia* in the North Sea on November 29, 1972.

A further announcement will give the venue and date of the opening of the hearing.

BSI annual report

THE annual report, 1972/73, of the British Standards Institution was published on October 16 and is available from the Institution at 2 Park Street, London W1A 2BS.

In his review, the Director General of BSI, Mr. G. B. R. Feilden, reports a year of sustained growth, but adds: 'our yardstick of progress in the 1970s and 1980s should not so much be the annual recording of an expansion in activity, but of the achievement of growth controlled so as to give the maximum return for our effort'. UK entry into the EEC had major implications for standards work with the prospect of 'reference to standards' as the source of technical criteria in European legislation. BSI is now getting to grips with the programme of work thus entailed. The rapid growth in international commitments presented severe pressures. At home, the implementation of the Robens Report on Safety and Health at Work would inevitably increase the responsibilities of standards-making bodies to help create a healthier industrial environment. 'Again, one of the consequences of the European legislative programme and of a more discerning consumer market here is that our work with and for consumers—particularly in matters of public health and product safety—is bound to increase. The steady achievement of control over this vast work programme is our major preoccupation in the period ahead.'

On international standards work, the report notes that of the 55 members of ISO (International Organisation for Standardisation), 27 countries share the responsibility of servicing nearly 1,200 ISO technical committees and working groups; of these BSI takes the lead, holding 277 secretariats. ISO Standards now number some 2,200; but it is estimated that about 10,000 will ultimately be required.

On the Quality Assurance side, areas covered by the Kitemark have expanded. Nine new schemes were launched, including schemes for rubber boats, aluminium windows and regulators for use with liquefied petroleum gas; and 104 new licences were issued, while at the end of the year another 140 applications for Kitemark licences were being processed. Negotiations were in an advanced stage for approval schemes for lighting fittings, vending machines and electric cables. Acceptability of the Kitemark in many overseas markets is confirmed by the issue of licences to manufacturers in the USA, Japan and many West European countries.

There is an ambitious programme for development at the Hemel Hempstead Centre to equip BSI to meet the certification challenges of Europe and to give certification and approval customers a more versatile and improved service; but this depends upon arrangements, yet to be completed, for substantial financial backing during the expansion period.

Mr. Maurice F. Strong (Canada), UN Secretary-General for the Environment, and Mr. Michael Heseltine, UK Minister for Aerospace and Shipping (right), pictured in London last week when Mr. Heseltine opened the marine pollution conference called by the UN Intergovernmental Maritime Consultative Organisation (IMCO). By means of two conventions, the month-long conference seeks to achieve—by 1975 if possible, but certainly by the end of the decade—the elimination of wilful and intentional pollution of the seas by oil and noxious substances other than oil, and the minimisation of accidental spills of oil.

UKAEA Annual Report

THE United Kingdom Atomic Energy Authority has just published its Nineteenth Annual Report and Accounts covering the period April 1, 1972 to March 31, 1973. Copies may be obtained free from the Authority's London Office, 11 Charles II Street, London SW1Y 4QP.

Non-competitive Government stores contracts

AGREEMENT has recently been reached between HM Government and the Confederation of British Industry as to the treatment of 'private venture' research and development expenditure in the pricing of non-competitive Government stores contracts. The agreement has been promulgated to contractors by way of the CBI and trade associations. It is also available to contractors (and potential contractors) as an addendum to Form GC/Stores/2, 'Pricing of Government Non-Competitive Stores Contracts' and may be obtained on application to the usual forms distribution centres within Government purchasing departments.

Copies of Form GC/Stores/2 will, in future, be supplied complete with Addendum No. 1 on 'private venture' research and development costs.

Price Commission decisions

Price increase applications

THE Price Commission have considered applications for price increases on non-food products from Category 1 companies. Two applications were withdrawn or lapsed without being approved. Of those allowed, five were on consumer goods and the rest on industrial and commercial products.

The following applications have either lapsed or have been withdrawn:

Brush Electrical Machines (a subsidiary of Hawker Siddeley): An application for an increase of 8.0 per cent on small AC generators.

RMC Industries Ltd. (a subsidiary of Ready Mixed Concrete Ltd.): An application for an increase of 5.0 per cent on reinforced panels and blocks.

The increases below have been allowed on the grounds of higher allowable costs. In one case the increase granted is less than that applied for.

Coats Paton Ltd.: The company has offset allowable increases in the costs of hand knitting yarns by increasing the proportion of synthetic fibres in existing blended yarns and by introducing blends of synthetic fibres and wool in some yarns previously all wool.

The Commission are satisfied within the terms of paragraphs 47 and 48 of the Code (which deal with changes in quality) that these changes will do no more than offset cost increases which would otherwise have justified higher prices.

Carrington Vivella Ltd.: An average of 1.57 per cent over the range of men's outerwear due to increased labour costs.

Charles H. Pugh Ltd. (ATCO), Qualcast (Lawn Mowers) Ltd., Suffolk Lawn Mowers Ltd. (subsidiaries of Birmid Qualcast Ltd.): An average of 6.99 per cent in the price of handmowers, powermowers, accessories and spare parts and between 1.8 per cent and 11.68 per cent on individual models and spares. This is based mainly on the higher costs of materials and labour.

Lever Brothers Ltd. (subsidiary of Unilever Ltd.): An average of 3.97 per cent on soaps and detergents. This is justified by higher costs of raw materials, particularly tallow and oils, and of labour. Large tablets of soap are expected to cost 1p more and giant packets of detergents will increase by ½p.

Procter and Gamble Ltd.: An average of 3.38 per cent on soaps and detergents. This is justified by higher costs of raw materials—oils, fats and chemicals in particular. Large size soap tablets are expected to cost up to 1p more and packets of detergents will go up by between ½p and 1½p.

Thames Board Mills (subsidiary of Unilever): An average of 2.5 per cent over the range of paper board products due mainly to higher costs of imported pulps. The increase is less than that applied for. The Commission were not satisfied that a larger increase would not cause the company to exceed its profit margin reference level.

The Chesterfield Tube Co. Ltd. (subsidiary of Tube Investments Ltd.): An average of 7.38 per cent for their range of drawn tubing, gas cylinders and extruded products. This is a consequence mainly of higher raw material prices and labour costs.

Shell Chemicals UK Ltd.: An average of 6.98 per cent and 6.92 per cent on polystyrene and polyethylene products, due to the increased costs of raw materials and labour.

Ophthalmic Opticians: An increase of 4p in the fee paid to ophthalmic opticians for National Health Service sight tests. This is justified by increases in allowable costs. NHS sight tests are free of charge to patients and this arrangement will be unaffected by the increase.

Price changes

Applications from the following companies have been considered by the Price Commission whose decisions are shown below. The increases take effect at once or within the next few days, except where otherwise stated.

United Biscuits (Holdings) Ltd.: Increases averaging 3.8 per cent over their range of biscuits, nut and crisp products. They are due to increased costs of raw materials, particularly biscuit flour.

Truman Ltd.: Increases averaging 1.5 per cent overall, to be applied to certain items including the wholesale price of special bitter beer, which will be increased by one half penny a pint, and the prices of this beer and of wines, spirits and other drinks in some of the company's managed houses. These increases are due mainly to higher labour and other operating costs. They take effect on October 18.

Birds Eye Group: Increases averaging 3 per cent over all frozen foods produced for the retail and catering trades. They are due mainly to the higher cost of meat and fish and take effect from October 29.

H. J. Heinz Co. Ltd.: An average increase of 3.6 per cent to be applied to a range of their products including baked beans and soups, but excluding infant foods. The increases are due to the higher costs of raw materials.

Beecham Group Ltd.: Increases on 'Ribena' averaging 4.9 per cent. There will be no increase on the 6 oz. bottle which is sold principally through clinics. The increases are due mainly to the higher costs of raw materials.

McDougall Catering Foods Ltd.: Increases of between 16 pence and 39 pence per pack, according to size and quality, for pre-packed plain and self-raising flours for use in the catering trade; **RHM Flour Mills Ltd.:** Increases of £2.00 per sack of 280 lb. on bulk household pre-packed flours. These are additional to the flour price increases announced on September 24, and are being made for the same reasons, ie the higher costs of imported and home-produced raw materials.

Lockwoods Foods Ltd.: Increases averaging 23 pence a case of 24 or 48 cans (depending on size) over a range of late seasonal and non-seasonal products; **Smedley-HP Foods Ltd.:** Increases averaging 26 pence a case of 24 or 48 cans (depending on size) over a range of similar products. In both cases the reasons for the increases are the higher costs of raw materials, particularly imported fruit and vegetables.

Berni Inns Group: Increases averaging 4.7 per cent to be applied selectively to prices of meals, beverages and accommodation in Berni Inns, Chef and Brewer and Schooner Inns. They are due mainly to increases in food and other operating costs and take effect on October 29.

Allied Breweries (UK) Ltd.: Increases averaging 10 per cent in the prices of meals, beverages and accommodation in Ind Coope hotels. They are due mainly to higher costs of labour and materials and come into effect during the next two weeks.

Unigate Foods Ltd.: An increase of £4.05 per cwt. on bulk instant skim milk powder. This is due to the higher cost of spray-dried skim milk powder.

An application by **Unigate Foods Ltd.** to increase by 6.4 per cent the price of clotted cream sent by post has been withdrawn.

Statistics of applications received and dealt with

FROM the beginning of Stage 2 up to October 5, the Price Commission received 944 applications for price increases from 153 pre-notifying concerns. The Commission has dealt with 782 cases of which about a third were either rejected outright (61 cases) or were withdrawn after scrutiny by the Commission (200 cases). Applications which were approved in a reduced form numbered 195 and 326 cases were approved in full. The number of applications outstanding on October 5 was 162.

Most of the approvals were given on the basis of the 'allowable costs' provisions of the Price and Pay Code, five on the grounds of ensuring investment by the company concerned and 26 where an enterprise was making a loss and was allowed to increase its prices in order to cover its costs. Of the 521 applications approved in full or in part, 232 were from the food sector and 289 from other sectors.

By October 5 the Price Commission's regional centres and headquarters Information Centre had received 48,918 telephone inquiries and 10,530 written inquiries about the terms of the Price Code and about certain price increases. Of these 24,488 consisted of inquiries from industry and the public about prices charged and in some 786 cases a price reduction was voluntarily effected.

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index	1971	1970	1970	1970	1970							
£m in base year		31,404	9,223	2,129	2,087	series in £ million				series in £ million		
1968	95	97	97	87	87	439	269	85	60	−271	−648	377
1969	97	98	98	93	92	416	320	42	13	444	−143	587
1970	99	100	100	100	100	257	175	68	−38	681	12	669
1971	100	103	101	92	101	19	−218	52	21	1,051	317	734
1972	102	109	102	83	111	−412	−498	28	22	83	−685	729
1971 1st qtr	98	100	100	96	97	114	10	14	−22	130	−62	192
2nd qtr	100	102	101	94	102	−103	−113	26	7	301	118	183
3rd qtr	101	103	101	92	105	−18	67	9	15	360	181	179
4th qtr	101	105	101	88	102	—	−47	3	21	260	80	180
1972 1st qtr	100	106	103	88	105	−136	−156	15	−9	73	−119	192
2nd qtr	102	108	102	84	110	−104	−145	−12	40	126	−50	176
3rd qtr	102	109	101	81	110	−87	−125	4	−8	−105	−284	179
4th qtr	104	111	102	81	118	−85	−72	22	−1	−11	−232	221
1973 1st qtr	108	114	109	87	123	248	168	18	52	−183	−363	180
2nd qtr	107	112	102	85	106	194	85	−14	152	−198 p	−396 p	198 p
% change latest 2 quarters:												
on prev. 2 quarters	+3.7	+2.7	+4.0	+6.8	+1.3							
on a year earlier	+5.9	+5.6	+3.3	+0.8	+7.4							

	Index of Industrial production		Personal expenditure		Prices and costs					Labour			Trade§	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Index of retail prices		Index of wholesale prices: all manufacturing industry		Basic hourly wage rates of manual workers (all industries and services)‡	Unemployed excluding school leavers and adult students		Unfilled vacancies for adults	Exports	Imports
			at 1966 prices	monthly averages	Index‡	% increase on a year earlier	basic materials and fuel used‡	manufactured products: home sales‡		mid-month count	% of total employees	mid-month count	at current prices	
Base of index	1970	1970	1966		Jan 16, 1962		1970	1970	July 31, 1972				1963	1963
£m in base year			11,549	thousands						thousands		thousands	4,282	4,362
1969			102.4	82.3	131.8	5.4	95.0	93.4	71.2	531	2.3	200	165	165
1970			103.6	91.4	140.2	6.4	100.0	100.0	78.5	568	2.5	186	184	181
1971			103.8	108.5	153.4	9.4	104.6	109.0	88.9	737	3.2	129	205	195
1972			110.0	138.6	164.3	7.1	109.2	114.8	101.4	816	3.6	145	213	225
1971 3rd qtr	100.6	99.4	104.4	116	155.3	10.1	105.6	110.3	89.6	772	3.4	119	214	194
4th qtr	100.4	99.0	106.9	132	157.3	9.2	104.8	110.8	92.7	832	3.7	118	210	200
1972 1st qtr	98.0	98.4	106.3	124	159.7	8.0	105.6	112.1	95.9	870	3.8	124	204	211
2nd qtr	102.7	101.3	108.5	147	162.7	6.2	106.1	113.5	98.1	835	3.7	135	216	216
3rd qtr	102.4	101.6	111.8	139	165.4	6.5	109.4	115.6	102.2	809	3.6	146	192	215
4th qtr	105.7	105.3	113.7	144	169.4	7.7	115.6	118.0	107.8	754	3.3	176	242	253
1973 1st qtr	109.8	109.8	117.1	150	172.4	8.0	126.0	119.5	108.8	665	2.9	229	246	275
2nd qtr	110.3	110.4	112.4	134	177.9	9.3	133.0 p	120.1 p	112.6	602	2.6	292	263	294
3rd qtr										563	2.5	332	285	329
Nov	105.7	105.5	113.0	148	169.3	7.6	115.3	118.3	108.2	756	3.3	177	239	261
Dec	106.1	105.8	116.2	139	170.2	7.7	118.7	118.5	108.4	727	3.2	188	235	255
1973 Jan	107.9	106.9	114.2	147	171.3	7.7	122.7	119.0	108.4	703	3.1	201	243	261
Feb	110.3	110.7	117.1	153	172.4	7.9	126.0	119.6	108.9	660	2.9	238	252	269
Mar	111.2	111.8	119.4	149	173.4	8.2	129.4	120.0	109.5	630	2.8	254	243	295
Apr	109.7	109.5	111.1	137	176.7	9.2	130.5	118.8•	112.3	617	2.7	275	267	274
May	110.1	109.4	110.7	132	178.0	9.5	132.4	120.1	113.2	599	2.6	296	252	306
June	111.0	112.2	114.8	133	178.9	9.3	137.2	121.3	115.6	590	2.6	307	271	303
July	111.1	111.4	115.9	145	179.7	9.4	144.4	122.7	115.9	578	2.5	325	275	314
Aug	111.3	111.2	116.0	151	180.2	8.9	150.1	123.9	119.5	565	2.5	327	284	332
Sept										545 p	2.4 p	345 p	279 p	341 p
% change latest 3 months:														
on prev. 3 months	+0.7	+1.2	+1.6	+3.0	+2.0		+10.0	+2.5	+4.7	−6.5		+13.8	+8.7	+11.8
on a year earlier	..	..	+3.8	−0.3	+9.2		+35.5	+6.8	+15.8	−30.4		+127.8	+48.5	+53.1

(‡) Not seasonally adjusted. (§) On a balance of payments basis. • After April, affected by changes due to VAT.

Monthly report on the economic situation

The following report on the economic situation, prepared by HM Treasury, will be published in *Economic Trends* for October at the end of the month. Unless otherwise stated, this report is based on seasonally adjusted data.

SYMBOLS USED IN ALL STATISTICAL TABLES

.. not available	r revised
— nil or less than half the final digit shown	* five week period
p provisional	ø fifty-three week period

Measures to control inflation

THE Government's proposals for Stage 3 of its counter-inflationary programme were set out in a consultative document (Cmnd 5444) published on October 8. Additional measures announced at the same time include a reduction of £100 million in public expenditure in 1973-74 as a result of spreading forward new public building contracts, a £10 special payment to pensioners at Christmas to be financed by an increase in employers' National Insurance contributions, and a proposal for a voluntary agreement with the building societies under which first-time house purchasers would pay a reduced rate of interest for the first five years.

Recent developments in aggregate demand and activity

The limited information so far available on the third quarter of this year suggests a resumption of growth of consumer demand after the fall in the second quarter, but an underlying growth rate substantially less than last year. There are no statistics of other components of demand apart from exports, which continue to grow strongly. In the second quarter the separate estimates of domestic product again diverged, but the output estimate—normally the least erratic over individual quarters—showed little change from the previous quarter. In the first half-year as a whole the growth of output was probably much in line with the forecast given in the Financial Statement and Budget Report in March.

In August the volume of retail sales was virtually unchanged from the July level, with a small rise in sales by food shops and some falling back in sales by clothing and footwear shops. In the three months June to August retail sales were about ¾ per cent above the monthly average for the first five months, a comparison which should not significantly be affected by the pre- and post-VAT distortions to sales. Thus while retail trade is at a high level there are at present no firm indications of a substantial upward trend. New car registrations were relatively high in August, giving a rise of 7 per cent in the latest three months over the previous three. But they are still no higher than in the latter part of last year.

In volume terms both imports and exports rose further in August. In the three months to August the volume of exports was some 4 per cent higher than in the previous three months, and the volume of imports about 1 per cent higher.

The latest investment intentions survey by the Department of Trade and Industry shows some further strengthening of manufacturers' intentions for 1973 since the last Survey in June. An increase of some 6 per cent is now expected in 1973, followed by a larger rise, of the order of 15 per cent, in 1974. This suggests a fairly strong rise in the remainder of this year following the rise of 7 per cent in the first half-year compared with the latter half of 1972. The latest Survey suggests that investment in the distributive and service industries, excluding shipping, will increase by about 4 per cent in 1973 with a further, smaller, increase in 1974.

The seasonally adjusted total of unemployed in Great Britain, excluding school-leavers and adult students, fell by 20,000 in September to stand at 545,000 or 2.4 per cent of all employees. Unfilled adult vacancies, which had increased by only 2,000 in August, rose by about 18,000 in September. The September movements in unemployment and vacancies were rather larger than the average for recent months; but apart from the fact that month-to-month changes can be erratic, the indirect effects of raising the school-leaving age will probably have affected the figures.

The latest estimates of industrial production, rebased to 1970, show little increase in recent months, following very strong increases around the turn of the year. In the three months May to July both the all-products index and the index of manufacturing production were only about ¼ per cent higher than in the previous three months. Within the total, production in the chemical and engineering industries continued to show strong rates of increase, offset by falls in output in most other sectors. Industrial production in the period May to July was 7¾ per cent higher than in the corresponding period a year earlier and manufacturing production 9½ per cent higher.

In September there was an estimated current account deficit of about £113 million. The deficit on visible trade was £178 million, whilst the balance on services and other current transations is estimated to have been running at a monthly surplus of about £65 million. In the third quarter the average monthly deficit on visible trade was £176 million a month compared with £132 million a month in the previous three months. The terms of trade have continued to worsen: in the three months to August (the latest for which information is available) the import unit value index rose by nearly 8 per cent compared with the previous three months, and the export unit value index by over 3 per cent. The value of exports in September was £1,061 million on a balance of payments basis, and in the third quarter they averaged 9 per cent higher than in the second quarter with deliveries to the EEC rising by 11 per cent. Imports in September were £1,239 million. In the three months July to September they averaged 12 per cent higher than the average in the second quarter.

National income and expenditure in the first half of 1973

There appears to have been little change in the level of domestic product in the second quarter of this year, following a strong increase in the first quarter. Both the output and income estimates were little changed between the two quarters. The expenditure estimate, which had shown a very large increase in the first quarter, fell back by 2½ per cent in the second but is thought to have been an unreliable guide to recent quarterly movements. In the first half as a whole the output estimate rose by 3½ per cent over the preceding half-year and the average estimate by about 3¾ per cent.

Nearly all components of demand showed substantial increases in the first half of 1973. Consumers' expenditure was about 2¾ per cent higher than in the preceding half-year and 6 per cent higher than a year earlier. But there was a fairly sharp fall within the half-year primarily because of the effect of the introduction of VAT on the timing of expenditure. Gross domestic fixed capital formation rose by 4 per cent in the first half as a whole, with a fall between the first two quarters of the year due in part to an erratic and very sharp drop in investment in ships. Exports of goods and services increased by over 8 per cent in the first half as a whole. Stockbuilding was again at a very high level in the second quarter, giving a rise of £465 million at 1970 prices for the first half-year as a whole.

Personal income before tax increased by nearly 4 per cent between the first and second quarters, and within the total the wage and salary bill rose by 3 per cent. After allowing for taxes on income and for the rise in consumer prices, real personal disposable income increased by 2¼ per cent in the second quarter, giving an increase of 3 per cent between the second half of 1972 and the first half of 1973. The personal savings ratio rose sharply from 7 per cent in the first quarter to 10½ per cent in the second but both these figures were distorted by the effect of VAT on the timing of consumers' expenditure; in the first half-year as a whole the savings ratio was 8¾ per cent, close to the 1972 average.

Prices and incomes

The retail price index (not seasonally adjusted) rose by about ¼ per cent in August to stand just under 9 per cent higher than a year earlier. The deceleration was due primarily to the effect of seasonal food prices. Food prices as a whole rose marginally in August with increases in the prices of eggs, meat and some other foods being more than offset by the substantially lower prices for fresh vegetables and fruit. The rise in non-food prices in August was rather under ½ per cent, less than in the two preceding months.

Wholesale price of home sales of manufactured goods rose by

about 1 per cent in September, about the same as in other recent months. Prices of food products rose on average by about 1½ per cent, with higher animal and poultry food prices accounting for most of the increase. Outside the food, drink and tobacco industries prices rose by about 1 per cent, a little more than in August. The price index of basic materials and fuels used by manufacturing industry was almost unchanged in September after having increased 15 per cent in the previous three months. In September the index was 38 per cent higher than a year earlier. In September increases in timber and cotton prices were offset by reductions for copper, maize and oilcake.

The index of hourly wage rates (not seasonally adjusted) increased by 3 per cent in August, but most of this increase was due to the implementation of the second stage of last year's engineering industry agreement. The seasonally adjusted index of average earnings increased by about 1½ per cent in July. As in the previous month the index may partly have reflected higher construction earnings under the second stage of the August 1972 agreement.

Financial developments

In the month to mid-August the narrow definition of money supply, M1, fell by ¼ per cent, bringing its total growth in the latest three banking months to 3 per cent. The broader version of the money supply, M3, rose by 2½ per cent in August and 9 per cent over the latest three months, but these figures are likely to exaggerate the true trend. The sharp rise in short-term interest rates during the August banking month led to some revival of 'merry-go-round' transactions—the use of overdraft facilities to invest in higher yielding bank liabilities—which inflate both bank advances and deposits included in M3 (but not in M1); apart from this, there is a particular difficulty arising from the different pattern of Government receipts following the changeover from purchase tax to VAT. After allowing as far as possible for these distortions the underlying rise in M3 over the latest three months is probably nearer 6 per cent than 9 per cent. In mid-September the overall reserve ratio of the banks was 13.8 per cent compared with 13.4 per cent the month before.

The United Kingdom official reserves fell by $134 million during September to stand at $6,382 million at the end of the month. Accruals of foreign currency borrowing by the public sector totalled $329 million.

Index of industrial production for Wales

WHILE the overall level of Welsh industrial output is provisionally estimated to have fallen by 0.5 per cent in the second quarter of 1973, manufacturing production advanced slightly to achieve a new record level.

The index for manufacturing output in Wales shows it to be 24.4 per cent above the level of 1968 and to have risen by 7.2 per cent over that of a year previous. The 0.5 per cent fall in the 'all industries' index over the quarter compares however with a rise of 0.5 per cent in the United Kingdom: overall the Wales index is 16.4 per cent higher than in 1968. (The recent rebasing of the United Kingdom figures, however, means that a direct comparison—Wales vis-à-vis the UK—is not strictly possible.)

Among manufacturing industries the Engineering and Allied Industries group maintained the level of the previous quarter, and stands 13.3 per cent higher than the revised figure for a year earlier. Within this group, the quarter showed a rise by Mechanical and Instrument Engineering (+8.6 per cent) and a smaller rise (1.3 per cent) by Electrical Engineering: both Vehicles and Metal Goods production however fell back, by 4.7 per cent and 4.2 per cent respectively. Among other groups advancing over the quarter were Chemicals, benefiting from new capacity (+5.4 per cent over the quarter and 15.1 per cent higher than a year ago); Textiles and Clothing (+1.6 per cent over the quarter); Timber, Furniture and Paper (+3.7 per cent); and Other Manufacturing (+2.8 per cent). The performance of the index was however held back by poor results for Metal Manufacture; the very large Ferrous Metals sector, representing 25 per cent of manufacturing output, fell by 2.9 per cent, while Non-Ferrous Metals declined steeply by 7.4 per cent over the quarter. Falls were also experienced in Food, Drink and Tobacco (−0.9 per cent), Coal and Petroleum products (−3.4 per cent) and Bricks, Pottery, Glass and Cement (−2.3 per cent).

Outside manufacturing, poor performance by Mining and Quarrying (−7.9 per cent) helped to bring down the general level of the index; while smaller falls were provisionally registered for Construction (−1.0 per cent) and Gas, Electricity and Water (−0.8 per cent).

ALL INDUSTRIES

Seasonally adjusted — 1968 = 100

1968 SIC	1968 weights per thousand	Annual indices				Quarterly indices				
						1972			1973	
		1969	1970	1971	1972	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.
Total: All industries	1,000	100·4	104·2	103·8	110·4	111·1	112·8	117·2	117·0	116·4
Mining and quarrying	91	87	74	72	64	73	70	83	76	70
Total: All manufacturing industries	695	103·4	110·2	109·4	116·3	116·0	118·7	123·3	124·1	124·4
Food, drink and tobacco	35	99	104	108	113	116	111	116	111	110
Coal and petroleum products	45	122	123	125	118	118	126	122	116	112
Chemicals and allied industries	76	103	106	97	118	119	116	120	130	137
Metal manufacture: Total	202	95	100	98	105	105	110	114	109	106
Ferrous	167	94	101	95	104	106	109	111	104	101
Non-ferrous	35	101	94	114	111	102	114	126	136	126
Engineering and allied industries	188	106	118	116	122	120	121	132	136	136
Mechanical and instrument engineering	46	106	117	112	107	106	109	114	116	126
Electrical engineering	56	103	128	127	139	132	142	154	156	158
Vehicles (including aircraft)	44	108	116	123	134	142	126	141	149	142
Metal goods n.e.s.	42	105	110	97	102	98	102	112	118	113
Textiles, and leather and fur, and clothing and footwear	58	104	108	112	118	120	126	125	123	125
Timber, furniture, etc., and paper, printing and publishing	33	113	116	117	127	123	133	130	136	141
Bricks, pottery, glass and cement, etc.	20	102	105	119	122	118	122	127	132	129
Other manufacturing industries	39	109	125	129	133	131	132	137	143	147
Construction	132	97	100	101	98	98	97	97	102	101
Gas, electricity and water	83	95	95	95	131	131	134	136	125	124

For a complete series from the first quarter of 1968 to the second quarter of 1973 contact Economic Services Division, Welsh Office, Cathays Park, Cardiff. (Tel: Cardiff 28066 ext. 314).

Note: The aggregated indices, ie, all industries, all manufacturing industries, and engineering and allied industries, have been reconstructed, and thus the above series may not exactly correspond to those previously issued.

UK OVERSEAS TRADE

The September current account of balance of payments

In September 1973, the current account is estimated to have been in deficit by about £113 million. The deficit on trade in goods was £178 million, seasonally adjusted, and the balance on services and other current transactions is estimated to have been running at a monthly surplus of about £65 million.

CURRENT ACCOUNT: THREE MONTHLY ANALYSIS

£ million per month seasonally adjusted

	Current balance	Visible balance: trade in goods	Invisible balance: services and other transactions (see Note 1(h))
1972 1st quarter	+25	−39	+64
2nd quarter	+42	−17	+59
3rd quarter	−35	−95	+60
4th quarter	−3	−77	+74
1973 1st quarter	−61	−121	+60
2nd quarter	−66	−132	+66
May-July	−102	−168	+66*
June-Aug	− 97	−162	+65*
July-Sept	−111	−176	+65*

* These figures are projections and are subject to revision as the relevant statistical information becomes available. Past experience suggests that they are unlikely to differ by more than £8 million a month from the first published quarterly estimates.

TABLE 1. VISIBLE TRADE ON BALANCE OF PAYMENTS BASIS

Seasonally adjusted values — £ million per month

	Exports (fob)	Imports (fob)	Visible balance
1971	733	709	+ 24
1972	761	818	− 57
1971 1st quarter	669	686	− 17
2nd quarter	753	718	+ 35
3rd quarter	762	705	+ 57
4th quarter	748	728	+ 20
1972 1st quarter	728	767	− 39
2nd quarter	769	786	− 17
3rd quarter	686	781	− 95
4th quarter	862	939	− 77
1973 1st quarter	878	999	−121
2nd quarter	937	1,069	−132
3rd quarter p	1,019	1,195	−176
April	945	996	− 51
May	900	1,111	−211
June	966	1,101	−135
July	982	1,140	−158
August r	1,013	1,206	−193
September p	1,061	1,239	−178
2nd quarter	937	1,069	−132
3rd quarter p	1,019	1,195	−176

p Provisional estimates.
r Revised estimates.

TABLE 1A. Three-monthly averages**

	Exports (fob)	Imports (fob)	Visible balance
1972 October	736	856	−120
November	857	951	− 94
December	862	939	− 77
1973 January	853	940	− 87
February	868	950	− 82
March	878	999	−121
April	904	1,015	−111
May	904	1,060	−156
June	937	1,069	−132
July	949	1,117	−168
August	987	1,149	−162
September	1,019	1,195	−176

** Average of month shown and two preceding months (see Note 1(d)).

Visible trade

(a) Summary. In September there was a deficit on visible trade of £178 million, seasonally adjusted; the value of exports was £1,061 million and the value of imports £1,239 million.

In the third quarter of this year the average monthly deficit on visible trade was £176 million a month compared with £132 million a month in the preceding three months. The terms of trade have continued to worsen; between the three months ended August (the latest period for which information is available) and the previous three months the terms of trade index fell by 4 per cent, the import unit value index increasing by nearly 8 per cent and the export unit value rising by over 3 per cent.

TABLE 2. EXPORTS

Seasonally adjusted values § — £ million per month

	Overseas trade statistics basis (fob)	Coverage adjustments	Net allowance for factors affecting recording †	Balance of payments basis (fob)
1971	765	−41	+ 9	733
1972	812	−51	—	761
1971 1st quarter	685	−30	+14	669
2nd quarter	779	−41	+15	753
3rd quarter	798	−46	+10	762
4th quarter	799	−46	− 5	748
1972 1st quarter	775	−48	—	728
2nd quarter	818	−49	—	769
3rd quarter	735	−49	—	686
4th quarter	921	−59	—	862
1973 1st quarter	945	−68	—	878
2nd quarter	1,010	−73	—	937
3rd quarter p	1,085	−66	—	1,019
April	1,018	−74	—	945
May	972	−72	—	900
June	1,041	−75	—	966
July	1,044	−62	—	982
August r	1,074	−61	—	1,013
September p	1,135	−74	—	1,061
2nd quarter	1,010	−73	—	937
3rd quarter p	1,085	−66	—	1,019

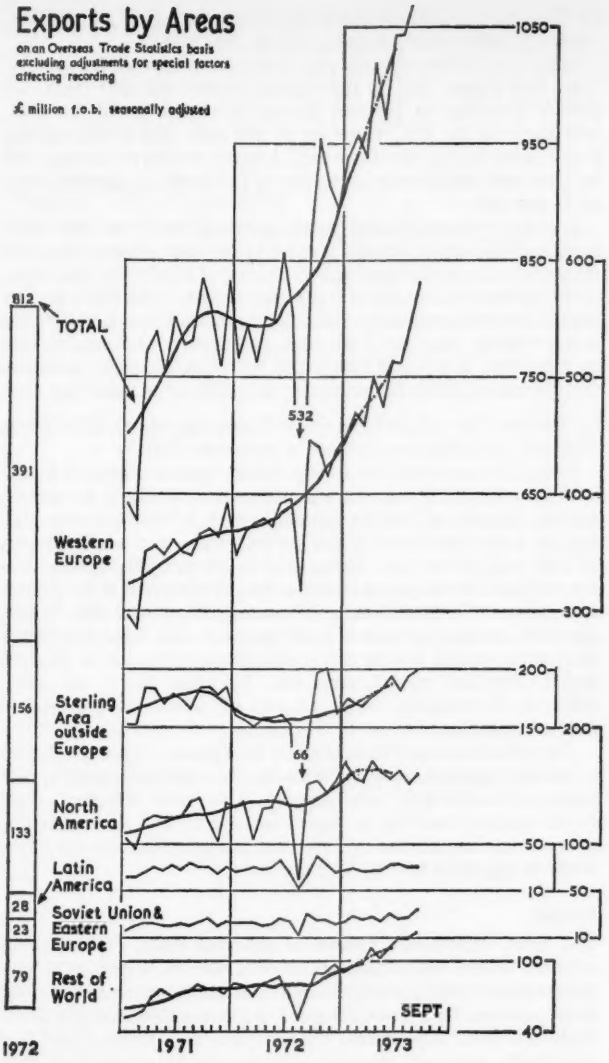
§ Components and totals are rounded independently.
† See Note 1(e).
p Provisional estimates.
r Revised estimates.

TABLE 3. IMPORTS

Seasonally adjusted values § — £ million per month

	Overseas Trade Statistics basis (cif)	Adjustments to balance of payments basis: Freight insurance and other valuation adjustments	Adjustments to balance of payments basis: Coverage adjustments ‡	Balance of payments basis (fob)
1971	818	− 83	−26	709
1972	930	− 87	−24	818
1971 1st quarter	792	− 85	−21	686
2nd quarter	820	− 84	−18	718
3rd quarter	816	− 82	−30	705
4th quarter	844	− 81	−35	728
1972 1st quarter	879	− 82	−30	767
2nd quarter	892	− 87	−19	786
3rd quarter	890	− 83	−27	781
4th quarter	1,057	− 95	−23	939
1973 1st quarter	1,134	−102	−33	999
2nd quarter	1,236	−114	−52	1,069
3rd quarter p	1,370	−127	−47	1,195
April	1,156	−110	−50	996
May	1,280	−115	−54	1,111
June	1,271	−118	−52	1,101
July	1,290	−115	−35	1,140
August r	1,392	−139	−47	1,206
September p	1,428	−129	−60	1,239
2nd quarter	1,236	−114	−52	1,069
3rd quarter p	1,370	−127	−47	1,195

§ Components and totals are rounded independently.
p Provisional estimates.
r Revised estimates.
‡ Including adjustments for arrivals of and payments for United States military aircraft, etc.



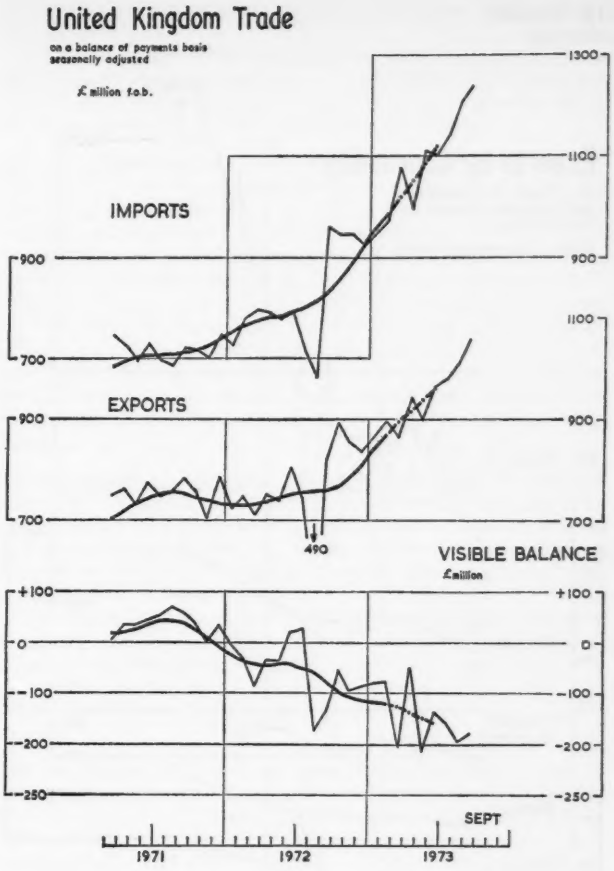


TABLE 4. Recorded values
Overseas trade statistics basis

£ million per month

		Exports fob ††	Imports cif ‡
1971	1st quarter	673.4	811.3
	2nd quarter	794.9	829.3
	3rd quarter	767.4	790.0
	4th quarter	822.9	847.3
1972	1st quarter	770.7	905.7
	2nd quarter	843.9	910.6
	3rd quarter	683.3	850.0
	4th quarter	950.7	1,052.1
1973	1st quarter	942.6	1,189.6
	2nd quarter	1,024.9	1,240.8
	3rd quarter p	1,019.0	1,317.2
	July	1,062.6	1302.2
	August r	1,034.4	1,349.9
	September p	960.1	1,299.5

†† No adjustment has been made in this table for special factors affecting the recording of exports (see Note 1(e)).
‡ Including arrivals of US military aircraft.
p Provisional estimates.
r Revised estimates.

TABLE 5. EXPORTS: AREAS¶
Overseas trade statistics basis

Seasonally adjusted values — £ million fob per month

		Total	Sterling area outside Europe	Western Europe inc. Irish Republic* Total*	EEC*	EFTA*	North America	Latin America	Soviet Union and Eastern Europe	Rest of world
1972		812	156	391	245	112	133	28	23	79
	4th qtr.	921	187	431	269	124	151	33	24	93
1973	1st qtr.	945	170	460	293	132	161	29	26	95
	2nd qtr.	1,010	184	495	319	136	163	29	27	108
	3rd qtr. p	1,085	192	547	355	149	158	31	29	122
	July	1,044	180	511	339	130	162	33	26	121
	August	1,074	194	548	355	149	149	31	28	121
	Sept p	1,135	201	581	371	168	159	31	34	124
	2nd qtr.	1,010	184	495	319	136	163	29	27	108
	3rd qtr. p	1,085	192	547	355	149	158	31	29	122

¶ See Note 1(b).
p Provisional estimates.
* See Note 1(g).

(*continued on next page*)

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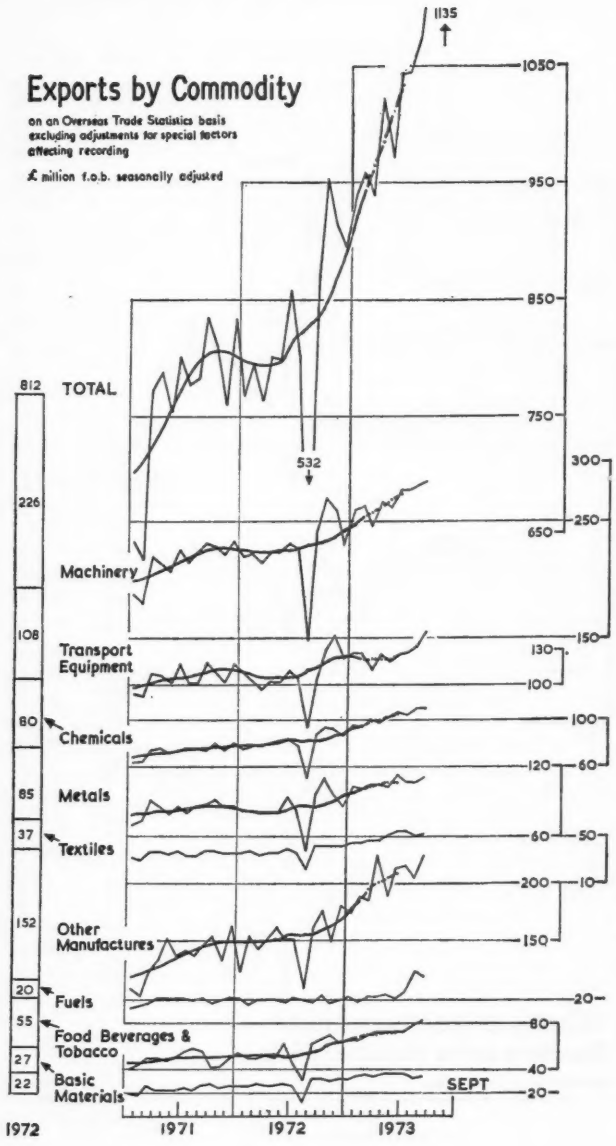
UK TRADE
continued



(b) Exports. The value of exports in September was £1,061 million, seasonally adjusted on a balance of payments basis.

In the third quarter of this year exports averaged £1,019 million, 9 per cent higher than in the second quarter. Between these two periods deliveries to Western Europe increased by 10 per cent, with those to the EEC rising by 11 per cent, and to the sterling area outside Europe by 4 per cent. Exports to North America fell by 3 per cent while those to the rest of the world in aggregate rose by 11 per cent.

Exports of manufactured goods increased by 5 per cent while exports of non-manufactures rose by 14 per cent. Among the main categories of manufactured goods, exports of machinery and transport equipment were nearly 6 per cent higher in the third quarter than in the previous quarter, although the increase in exports of road motor vehicles was only 2 per cent, and exports of chemicals rose by 5 per cent. Exports of metals and miscellaneous metal manufactures increased slowly in the quarter, by a little more than 1 per cent.

(c) Imports. The value of imports in September was £1,239 million, seasonally adjusted on a balance of payments basis.

In the three months July to September, imports averaged £1,195 million a month, 12 per cent higher than the average in the second quarter. Imports of fuels in September were below their very high level in August but nevertheless for the quarter as a whole imports of fuels were 16 per cent higher than in the previous quarter. Imports of food, beverages and tobacco rose by 6 per cent in the quarter and imports of industrial materials increased by 11 per cent. Within this latter category arrivals of basic materials were 5 per cent higher than in the second quarter and semi-manufactures were 13 per cent higher. Finished manufactures also increased by 13 per cent; deliveries of machinery which account for about half the total of finished manufactures rose by 12 per cent.

The value of imports from Western Europe was 15 per cent higher in the third quarter compared with the previous three months, with imports from the EEC increasing by 13 per cent. Shipments from North America were up by 4 per cent and those from the sterling area outside Europe rose by 2 per cent. Imports from the rest of the world in aggregate rose by 13 per cent.

Notes

1(a) Trade figures on a balance of payments basis. The seasonally adjusted import and export figures on a balance of payments basis are obtained by making various adjustments to the seasonally adjusted figures derived from those recorded in the monthly Overseas Trade Statistics. These adjustments are summarised in Tables 2 and 3 of this article. Some are valuation adjustments; the principal of these is the deduction from the import figure of freight and insurance costs. The other adjustments relate to coverage, either to bring in items not in the Trade Statistics (for example on the import side ships built and delivered abroad direct to UK owners) or to remove items which are in the Trade Statistics (mainly returned goods and goods for processing and repair). The adjustment of imports to a balance

TABLE 6. EXPORTS: COMMODITY CLASSES¶ Overseas trade statistics basis

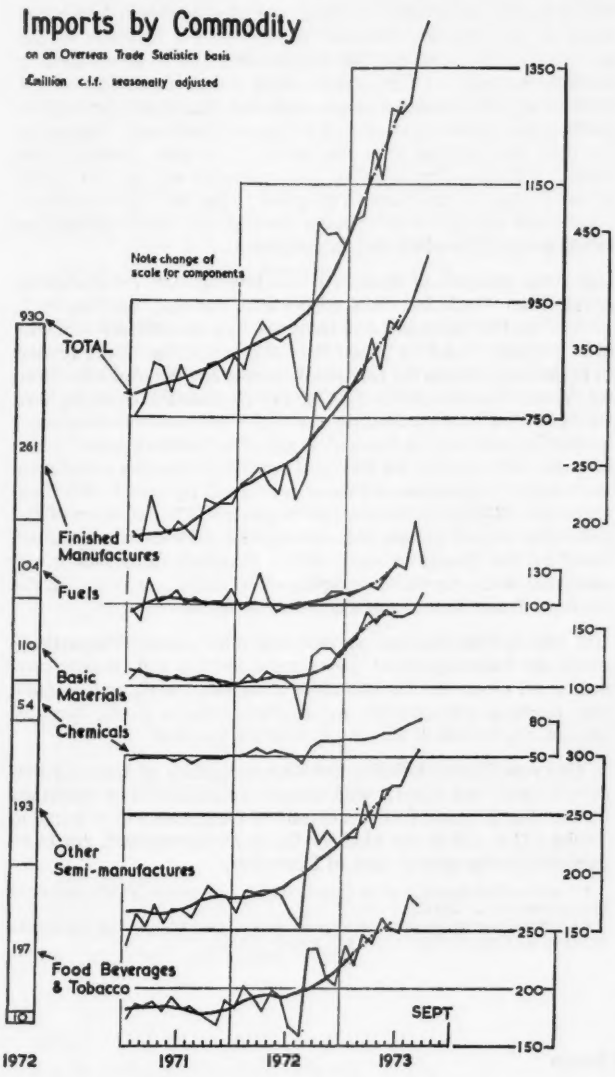
Seasonally adjusted values — £ million fob per month

		Manufactures												
							Machinery and transport equipment							
		Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road motor vehicles	Other transport equipment	Chemicals	Metals and miscellaneous metal manufactures	Textiles	Other manufactures	Miscellaneous
1972		812	55	27	20	688	335	226	76	32	80	85	37	152	22
	4th quarter	921	67	31	21	786	384	254	94	37	91	97	42	169	22
1973	1st quarter	945	68	34	21	801	377	256	88	33	96	102	45	182	22
	2nd quarter	1,010	72	36	22	857	393	269	90	33	102	106	50	208	25
	3rd quarter p	1,085	77	34	37	903	416	280	92	46	108	107	51	221	27
	July	1044.	71	36	27	880	403	276	92	38	104	107	53	214	23
	August	1,074	78	33	44	885	414	280	87	50	110	105	49	204	30
	September p	1,135	82	34	40	945	430	285	97	50	110	110	51	244	28
	2nd quarter	1,010	72	36	22	857	393	269	90	33	102	106	50	208	25
	3rd quarter p	1,085	77	34	37	903	416	280	92	46	108	107	51	221	27

¶ See Note 1(b).
p Provisional estimates.

of payments basis excludes the values of deliveries of US military aircraft (including spares and some missiles) but includes the payments for those imports which are mainly being financed by a special US Exim Bank credit. (The values involved are now small.) All these adjustments are described in greater detail in the annual 'Pink Book', *United Kingdom Balance of Payments 1973* (Table 6 and pp. 62-66) and in an article in the issue of *Trade and Industry* dated November 4, 1970.

Since firm figures for the adjustments do not become available as quickly as the recorded trade statistics, the figures for imports and exports on a balance of payments basis in the latest months are at this stage preliminary estimates and liable to revision.



1(b). The adjustments described at Note 1(a) are made only for the monthly totals of exports and imports, and cannot be estimated for the area and commodity analysis of trade. The values of total trade and the main components of exports and imports in Tables 5 to 8 are available only on the Overseas Trade Statistics basis and correspond with the totals given in the first columns of Tables 2 and 3. Whereas comment on total trade relates to total exports and imports on a balance of payments basis, analyses of the area and commodity patterns of trade in this article are based on the figures on the Overseas Trade Statistics basis in Tables 5 to 8. The main components of trade are seasonally adjusted independently from the totals and in consequence do not always add exactly to the seasonally adjusted totals.

1(c) Visible balance. The visible balance is the difference between the import and export figures on a balance of payments basis obtained as described in Note 1(a) above. Since, as noted above, the import and export figures for the most recent months are provisional, it follows that the monthly visible balances for these months are also provisional and liable to revision.

The monthly figures for the visible balance are published only on a seasonally adjusted basis. Since the balance is the difference of two large and variable figures, it is itself liable to fluctuation and undue significance should not be attached to a single month's figure; it is more useful to consider the average balance over three or more months.

1(d) Trends. Even after allowing for seasonal influences, the sequence of monthly figures is usually too variable to give a satisfactory indication of the underlying trend. While it is possible to construct elaborate estimates of trend these cannot be applied to the most recent months, and a simple method of giving some guidance on underlying movements in the most recent past is to take averages of three months. These averages, for the month in question and the two preceding months, are given in Table 1A. Although they are still sensitive to irregular movements in the monthly figures and to special influences, they are markedly less variable than the monthly figures. Apart from occasions when major disturbances distort the flow of trade, the three-monthly average gives a quite good short-term guide and has the merit of simplicity.

1(e) Recording of exports. The new system for the documentation of exports to ensure full recording has applied to goods shipped from October 25, 1971 (see *Trade and Industry* August 19, 1971).

Regular assessments of the quality of recording under the new system have shown that, since the beginning of 1972, there has been no need to make adjustments to the export figures for either a short-

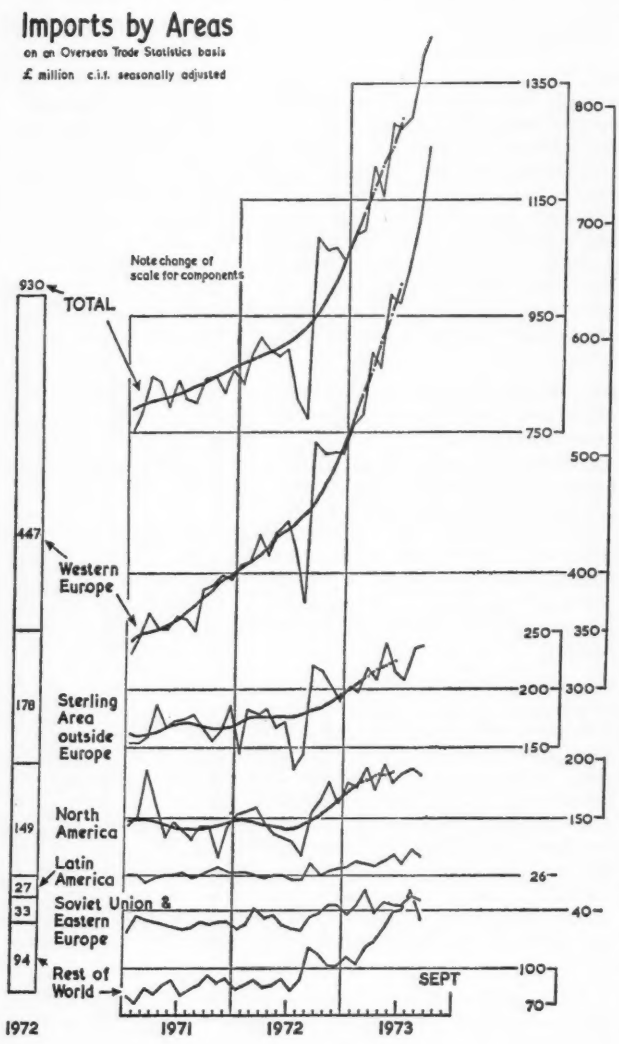
(*continued on next page*)

TABLE 7. IMPORTS: COMMODITY CLASSES¶ Overseas trade statistics basis

Seasonally adjusted values — £ million cif per month

	Total	Total excluding US military aircraft, etc.	Food, beverages and tobacco	Fuels	Industrial materials				Finished manufactures		
					Total	Basic materials	Chemicals	Other semi-manufactures	Total	Excluding US military aircraft, etc.	Miscellaneous
1972	930		197	104	358	110	54	193	261		10
4th quarter	1,057		215	108	419	129	62	228	308		10
1973 1st quarter	1,134		235	112	450	146	64	240	334		10
2nd quarter	1,236		250	127	485	160	68	258	358		11
3rd quarter p	1,370		266	147	537	168	78	291	405		14
July	1,290		248	132	509	160	74	275	381		12
August	1,392		280	173	535	163	78	294	404		15
September p	1,428		272	135	568	181	83	304	430		15
2nd quarter	1,236		250	127	485	160	68	258	358		11
3rd quarter p	1,370		266	147	537	168	78	291	405		14

p Provisional estimates.
¶ See Note 1(b).



fall in documentation or a change in the speed of submission of documents.

The new system for recording exports and the methods used to monitor its accuracy are described in an article in *Trade and Industry* February 15, 1973.

1(f) Timing. The figures for exports relate to documents received in the Statistical Office of HM Customs and Excise up to a few days before the end of the calendar month. On average export documents arrive at the Customs Statistical Office within a fortnight of the shipment of goods, so that the documents relate to goods passing through the ports in the month ending about the middle of the calendar month to which they are attributed. The figures for imports relate to documents received at the Customs Statistical Office up to the third working day after the end of the month. Importers are usually required to present their documents before they can obtain customs clearance and remove the goods. Thus the import statistics correspond closely to movements through the ports during the calendar month to which they are attributed.

1(g) Area analyses of trade. To take into account the change in composition of selected areas arising from the entry on January 1, 1973 of the Irish Republic and Denmark into the enlarged EEC the area headings in tables 5 and 8 of this article have been revised or re-defined. Figures for the Irish Republic are included with those for Western Europe and the EEC and to avoid double counting have been excluded from the Sterling area which has now been designated as 'Sterling area outside Europe'. Figures for Denmark are of course included with those for the EEC and not EFTA. In order to facilitate meaningful comparisons with past periods all figures in both these seasonally adjusted tables are on the present 1973 definition of the selected areas and groups of countries. The analyses in the text are based on the figures in these tables. Standard definitions of all areas and some economic grouping of countries are shown in the *Overseas Trade Statistics of the United Kingdom.*

1(h) The invisible balance (services and other current transactions) covers the following items: Government services and transfer payments; all other services including transport, travel, and banking and financial transactions; net overseas income in the form of interest, profits and dividends; and private transfers.

2. Overseas Trade Statistics. Detailed particulars of United Kingdom imports and exports with cumulative totals will be published on October 25*, and further analysis of the figures will be found in Tables 122 to 133 in the *Monthly Digest for* November†, due to be published in the second week of December.

* *Overseas Trade Statistics of the United Kingdom,* published by HMSO, price £1.85 (annual subscription £25.05).

† *Monthly Digest of Statistics,* published by HMSO, price 63p (annual subscription including Supplement of Definitions and postage, £8.60).

TABLE 8. IMPORTS: AREAS¶ Overseas trade statistics basis

Seasonally adjusted values — £ million cif per month

				Western Europe inc. Irish Republic*			North America				
	Total	Total excluding US military aircraft etc.	Sterling area outside Europe	Total*	EEC*	EFTA*	Total	Excl. US military aircraft etc.	Latin America	Soviet Union and Eastern Europe	Rest of World
1972	930		178	447	293	134	149		27	33	94
4th quarter	1,057		204	503	326	156	169		29	42	106
1973 1st quarter	1,134		206	552	361	169	184		36	46	111
2nd quarter	1,236		222	614	409	179	183		38	41	134
3rd quarter p	1,370		227	708	462	217	189		42	47	153
July	1,290		208	661	432	201	188		35	43	150
August	1,392		235	698	476	201	193		48	51	167
September p	1,428		239	766	477	249	186		42	47	142
2nd quarter	1,236		222	614	409	179	183		38	41	134
3rd quarter p	1,370		227	708	462	217	189		42	47	153

p Provisional estimates.
¶ See Note 1(b).
* See Note 1(g).

Addresses of ECGD local offices

The Export Credits Guarantee Department (ECGD) is a Government Department providing export credit insurance for United Kingdom exporters and insurance against political risks for new investments overseas. Although credit insurance is its main service to exporters the Department offers them a number of others. Firstly the Bank Guarantee scheme is available to exporters who have held an ECGD comprehensive type policy for 12 months. This scheme enables exporters to obtain export finance from their bank at a special low rate. Major projects carried out by British firms in overseas countries can be financed by the buyer credit technique which gives the exporter the bulk of his payment on shipment of the goods. Similar to this is the line of credit facility which extends the buyer credit principle to include contracts often with an individual value as low as £10,000. ECGD now insures 38 per cent of all UK exports. For full details of all ECGD services contact Publicity Branch, ECGD, Aldermanbury House, Aldermanbury, London EC2 2EL, telephone 01-606 6699 extension 258, telex 883601, or get in touch with your local branch office listed below.

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London (South)
London postal districts of SE1-27 and SW2-20, W2-14. Counties of Kent, Surrey and Sussex, East Hampshire, the Isle of Wight and the Channel Isles.
G. J. A. Link, First Floor, Lancaster House, 70 Newington Causeway, SE1 6EG. Tel. 01-407 5011. Telex 888575.

London (North)
London postal districts of N, EC1, WC1 and 2, South Herts and South Bucks, and Middlesex.
C. W. Gentry, 1-4 Old North Street, Red Lion Square, WC1R 4TE. Tel. 01-405 8991. Telex 263615.

London (West)
London postal district EC4, NW, SW1 and W1.
D. G. Hake, Waverley House, 7-12 Noel Street, London W1V 3PB. Tel. 01-437 2292. Telex 24105.

Belfast
The six counties of Northern Ireland.
R. H. Forsyth, River House, High Street, Belfast BT1 2BE. Tel. Belfast 31743/4. Telex 74577.

Birmingham
Counties of Shropshire, Hereford, Worcester, Warwick, Merioneth, Montgomery, Radnor, Stafford and parts of the counties of Derby and Nottingham.
F. Wilmot, Chamber of Commerce House, Harborne Road, Birmingham B15 3DL. Tel. 021-454 4375. Telex 33132.

Bristol
Counties of Gloucester, Wiltshire, Dorset, Somerset, Devon, Cornwall, Oxfordshire, Berkshire, West Hampshire, Cardigan, Brecon, Pembroke, Carmarthen, Glamorgan and Monmouth.
K. I. Humphrey, Washington House, Great George St., Bristol BS1 5QL. Tel. Bristol 22102. Telex 44248.

Cambridge
Counties of Bedford, Cambridge, Huntingdon and Peterborough, Northants, Norfolk, Suffolk, North Bucks, North Essex, North Herts and South Lincs, including City of Lincoln.
H. Watson, Prudential Buildings, 59 St. Andrews Street, Cambridge CB2 3HA. Tel. Cambridge 67736, Telex 81624.

Glasgow
Scotland and the Outer Isles.
F. R. Burge, Fleming House, 134 Renfrew Street, Glasgow G3 6TL. Tel. 041-332 8707. Telex 77130.

Leeds
The counties of York, Durham, Northumberland and part of Lincoln.
W. Ford, Liverpool Victoria House, 8 Otley Road, Leeds LS6 2AN. Tel. Leeds 782121. Telex 55125.

Manchester
Lancashire, Cheshire, Cumberland, Westmorland and part of Derbyshire; the Welsh counties of Anglesey, Caenarvon, Denbigh and Flint and the Isle of Man.
R. H. K. Hughes, Elisabeth House, St. Peter's Square, Manchester, M2 4AJ. Tel. 061-228 3621. Telex 667756.

Nottingham
Counties of Leicester and Rutland, and parts of the counties of Nottingham, Derby and Lincoln.
B. Kirwin, Equitable House, Old Market Square, Nottingham NG1 2LE. Tel. Nottingham 46585. Telex 37566.

New York
In the United States exporters can obtain assistance from the Department's resident Representative for the USA and Canada:
J. A. Dorrian, DFM, c/o British Trade Development Office, 150 East 58th Street, New York 10022, USA. Tel. 212-593-2258. Telex 420543.

United Kingdom trade by air in the first half of 1973

UNITED Kingdom trade by air continued to grow in the first half of this year. Imports carried by air totalled £1,068 million, an increase of 49 per cent on the first half of 1972. Over this period total imports rose by 34 per cent. Exports carried by air in the first six months of 1973 totalled £948 million, an increase of 31 per cent on a year earlier. The corresponding rise in total exports was 22 per cent. The share of UK trade by air in total trade fell back slightly in the first half of this year from the level in the second half of 1972 which was, however, probably inflated by diversion to air freight at the time of the UK dock strike in the summer of 1972.

The commodity analyses of tables 2 and 3 illustrate the relative importance of the different categories of trade by air. Comparisons with the second half of 1972 are to some extent distorted by the effect of the UK dock strike. Machinery (Divisions 71 and 72) continued to be the most important group, accounting for over a third of the total value of both exports and imports carried by air in the first half of 1973. Other important groups in trade by air were non-metallic mineral manufactures (mainly precious stones) (Division 66), transport equipment (Division 73) and scientific instruments (Division 86).

For some classes of merchandise carriage by air accounts for a significant part of total imports and exports. Those commodities with the highest proportions of goods exported by air in the first half of this year were clothing (Division 84) 43 per cent, medicinal and pharmaceuticals (Division 54) 42 per cent, and hides, skins and furskins (Division 21) 40 per cent. Among imports the commodities with the highest proportion of goods carried by air were non-metallic mineral manufactures (Division 66) 63 per cent, scientific instruments (Division 86) 49 per cent, and medicinal and pharmaceuticals (Division 54) 44 per cent.

The pattern of air trade by main areas and countries is shown in tables 4 and 5. The proportion of trade with Western Europe accounted for by airborne trade continued to rise in the first half of this year to about 47 per cent and it remained our major area for air trade. Together, Western Europe and North America accounted for more than three-quarters of both export and import air trade. The proportion of air trade with the Sterling Area outside Europe continued to fall sharply to around 10 per cent.

The United States of America continued to be our largest single trading partner for trade by air, as it is for total trade. In the first half of this year 28 per cent of our exports to and 39 per cent of our imports from the United States were conveyed by air. Over one-half of our trade with Switzerland in the first six months of this year was carried by air, making Switzerland the UK's second largest partner in air trade.

TABLE 1. VALUE OF TRADE COMPARED WITH TOTAL TRADE

Year	Exports			Imports		
	Total £m fob	By air £m fob	Per cent of total export	Total £m cif	By air £m cif	Per cent of total imports
1968	6,433.9	831.5	12.9	7,897.5	929.4	11.8
1969	7,339.4	978.9	13.3	8,315.0	1,082.6	13.0
1970	8,061.1	1,095.1	13.6	9,036.8	1,220.2	13.5
1971	9,175.5	1,304.3	14.2	9,833.9	1,342.2	13.6
1972	9,745.7	1,538.3	15.8	11,155.4	1,593.8	14.3
1972 1st half	4,843.6	723.9	14.9	5,449.0	715.9	13.1
2nd half	4,902.1	814.4	16.6	5,706.4	877.9	15.4
1973 1st half	5,902.5	947.6	16.1	7,291.4	1,067.9	14.6

TABLE (1a). INCREASE IN VALUE OF UNITED KINGDOM TRADE (PER CENT ON A YEAR EARLIER)

Year	Exports		Imports	
	Total	By air	Total	By air
1968	23	37	23	45
1969	14	18	5	16
1970	10	12	9	13
1971	14	19	9	10
1972	6	18	13	19
1972 1st half	10	18	11	12
2nd half	3	18	16	25
1973 1st half	22	31	34	49

TABLE 2. COMMODITY COMPOSITION OF EXPORTS

Selected divisions	2nd half 1972			1st half 1973		
	Total £m. fob	By air £m. fob	Per cent of total exports	Total £m. fob	By air £m. fob	Per cent of total exports
†00 Live animals (excluding zoo animals, dogs and cats)	24·7	7·2	29·1	21·5	5·1	24
21 Hides, skins and furskins, undressed	38·2	12·9	33·8	43·8	17·4	40
51 Chemical elements and compounds	125·8	12·6	10·0	167·4	16·2	10
54 Medicinal and pharmaceutical products, polishing	91·3	40·0	43·8	107·2	44·6	42
55 Essential oils and perfume materials, toilet, and cleansing preparations	38·1	2·8	7·3	46·6	2·6	6
61 Leather, leather manufactures, not elsewhere specified, and dressed furskins	34·2	11·9	34·8	43·4	14·0	32
62 Rubber manufactures, not elsewhere specified	46·6	2·2	4·7	60·7	2·5	4
65 Textile yarn, fabrics made up articles and related products	224·2	24·7	11·0	282·5	24·4	9
66 Non-metallic mineral manufactures, not elsewhere specified	321·3	93·3	29·0	455·3	137·3	30
68 Non-ferrous metals	182·1	33·4	18·3	241·9	51·8	21
69 Manufactures of metal, not elsewhere specified	140·7	8·5	6·0	166·3	10·3	6
71 Machinery other than electric	1,011·1	204·9	20·3	1,208·8	236·2	20
72 Electrical machinery, apparatus and appliances	331·1	87·3	26·4	394·7	102·9	26
73 Transport equipment	611·5	69·3	11·3	720·2	73·8	10
84 Clothing, knitted or crocheted articles, including elastic or rubberised fabric and articles of fur	81·6	38·3	46·9	72·5	31·1	43
85 Footwear, gaiters and the like	16·6	2·8	16·9	15·4	2·2	14
86 Professional, scientific and controlling instruments, photographic and optical goods, watches and clocks	136·3	47·2	34·6	166·4	50·3	30
89 Miscellaneous manufactured articles, not elsewhere specified	215·4	60·7	28·2	237·8	68·7	29
All other goods	1,231·3	54·4	4·4	1,450·0	56·3	4
Total	4,902·1	814·4	16·6	5,902·5	947·6	16

† Figures shown under this heading, include horses exported temporarily for racing, breeding or other purposes.

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TABLE 3. COMMODITY COMPOSITION OF IMPORTS

Selected Divisions		2nd half 1972 Total £m. cif	2nd half 1972 By air £m. cif	2nd half 1972 Per cent of total imports	1st half 1973 Total £m. cif	1st half 1973 By air £m. cif	1st half 1973 Per cent of total imports
†00	Live animals (excluding zoo animals, dogs and cats)	36·8	4·8	13·0	31·8	3·8	12
21	Hides, skins and furskins, undressed	46·9	22·4	47·8	58·4	17·9	31
28	Metalliferous ores and metal scrap	143·2	14·2	9·9	186·9	24·8	13
51	Chemical elements and compounds	134·1	23·5	17·5	159·1	22·4	14
54	Medicinal and pharmaceutical products	23·7	11·6	48·9	30·1	13·3	44
55	Essential oils and perfume materials, toilet, polishing and cleansing preparations	16·7	4·4	26·3	22·9	4·9	21
61	Leather, leather manufactures, not elsewhere specified, and dressed furskins	24·7	2·8	11·3	36·8	4·8	13
65	Textile yarn, fabrics, made up articles and related products	191·1	26·9	14·1	241·0	28·0	12
66	Non-metallic mineral manufactures, not elsewhere specified	306·1	201·3	65·8	387·3	242·8	63
68	Non-ferrous metals	233·0	14·4	6·2	295·9	15·3	5
69	Manufactures of metal, not elsewhere specified	72·7	10·4	14·3	91·9	12·8	14
71	Machinery other than electric	539·6	199·5	37·0	716·9	259·3	36
72	Electrical machinery, apparatus and appliances	288·1	115·9	40·2	380·0	148·7	39
73	Transport equipment	308·4	23·5	7·6	414·0	34·2	8
84	Clothing, knitted or crocheted articles, including elastic or rubberised fabric and articles of fur	116·9	31·6	27·0	146·9	29·7	20
85	Footwear, gaiters and the like	29·1	4·0	13·7	42·6	5·2	12
86	Professional, scientific and controlling instruments, photographic and optical goods, watches and clocks	108·3	59·5	54·9	131·7	64·5	49
89	Miscellaneous manufactured articles, not elsewhere specified	192·7	71·7	37·2	239·4	96·2	40
	All other goods	2,894·4	35·5	1·2	3,677·7	39·2	1
	Total	5,706·4	877·9	15·4	7,291·4	1,067·9	15

† Figures shown under this heading, include horses imported temporarily for racing, breeding or other purposes.

Statistical note

Comparisons of air trade between the first half of this year and the second half of 1972 may be to some extent distorted by the possible effects of trade diversion to air at the time of the UK dock strike in the second half of last year. The valuation of exports and imports in this article are on an *Overseas Trade Statistics* basis. While basis estimates for total trade are published on a balance of payments in the monthly trade article, the adjustments to that basis are not available for the main commodity groups or trading areas, nor for the analysis of trade by air.

Complete newly-built aircraft flown in and out under their own power are included in the totals for all United Kingdom trade but are excluded from the figures of trade by air.

No allowance is made either in the totals of trade or in the figures of trade by air for under-recording of exports (see *Trade and Industry*, November 25, 1970, page 319).

Imports by parcel post are included in total imports but are not available for inclusion in the figures of imports by air.

Exports by parcel post are included both in total exports and in exports by air.

TABLE 4. EXPORTS TO, AND IMPORTS FROM, VARIOUS AREAS BY AIR

	Exports 2nd half 1972 £m fob	Exports 1st half 1973 £m fob	Exports Per cent of total	Imports 2nd half 1972 £m cif	Imports 1st half 1973 £m cif	Imports Per cent of total
Sterling Area outside Europe	106.6	120.9	12.8	84.1	98.7	9.3
Western Europe	396.6	460.7	48.6	414.7	496.6	46.5
North America	212.2	250.7	26.5	251.6	335.8	31.4
Latin America	14.9	15.5	1.6	7.6	12.6	1.2
Soviet Union and Eastern Europe	7.4	9.6	1.0	71.7	76.5	7.2
Non-Sterling Middle East	33.1	36.4	3.8	10.6	14.2	1.3
Rest of the World	43.6	53.7	5.7	37.6	33.4	3.1
Total	814.4	947.6	100.0	877.9	1,067.9	100.0

TABLE 5. EXPORTS TO, AND IMPORTS FROM, SELECTED COUNTRIES

Selected countries	Exports 2nd half 1972 Total £m. fob	Exports 2nd half 1972 By air £m. fob	Exports 2nd half 1972 Per cent of total exports	Exports 1st half 1973 Total £m. fob	Exports 1st half 1973 By air £m. fob	Exports 1st half 1973 Per cent of total exports	Imports 2nd half 1972 Total £m. cif	Imports 2nd half 1972 By air £m. cif	Imports 2nd half 1972 Per cent of total imports	Imports 1st half 1973 Total £m. cif	Imports 1st half 1973 By air £m. cif	Imports 1st half 1973 Per cent of total imports
Western Germany	305·0	59·2	19·4	357·2	68·1	19·1	444·5	74·2	16·7	605·6	91·2	15·1
Netherlands	231·1	23·9	10·3	281·4	25·1	8·9	301·6	25·6	8·5	426·0	30·8	7·2
Belgium	200·6	17·8	8·9	274·1	22·6	8·2	163·1	32·5	19·9	194·7	28·1	14·4
France	259·3	67·6	26·1	326·6	77·5	23·7	309·0	72·0	23·3	455·3	88·3	19·4
Italy	145·4	31·5	21·7	179·1	35·4	19·8	186·8	20·0	10·7	217·9	23·7	10·9
Sweden	198·8	17·3	8·7	243·7	19·8	8·1	266·4	10·7	4·0	336·4	12·6	3·7
Denmark	120·2	8·3	6·9	147·4	9·5	6·4	182·7	6·5	3·6	220·5	7·3	3·3
Switzerland	202·0	94·5	46·8	233·8	117·3	50·2	205·7	117·9	57·3	262·0	151·0	57·6
Portugal	54·2	5·8	10·7	68·4	8·0	11·7	66·5	18·5	27·8	85·4	22·6	26·5
Austria	64·2	6·6	10·3	68·7	6·9	10·0	67·4	6·9	10·2	83·9	7·6	9·1
Spain	77·4	11·7	15·1	102·9	14·5	14·1	76·1	4·0	5·3	83·5	5·1	6·1
Irish Republic	235·5	26·2	11·1	291·7	27·8	9·5	215·2	15·4	7·2	239·9	15·0	6·3
United States of America	625·2	174·4	27·9	732·6	206·8	28·2	598·6	223·8	37·4	767·9	298·7	38·9
Canada	183·6	37·5	20·4	206·8	43·8	21·2	298·3	23·5	7·9	342·2	33·1	9·7
India	65·6	13·9	21·2	67·2	15·7	23·4	62·8	14·5	23·1	67·5	8·2	12·1
Australia	159·2	16·4	10·3	193·5	18·2	9·4	149·1	3·6	2·4	185·7	4·3	2·3
Republic of South Africa	149·4	13·1	8·8	180·5	14·9	8·3	146·5	13·1	8·9	198·4	20·1	10·1
Japan	86·5	31·6	36·5	124·2	41·0	33·0	186·5	16·4	8·8	204·8	17·2	8·4
Total	3,363·4	657·3	19·5	4,079·9	772·6	18·9	3,926·7	699·2	17.8	4,977·6	865·1	17·4
All other countries	1,538·7	157·1	10·2	1,822·5	175·0	9·6	1,779·7	178·8	10·0	2,313·7	202·8	8·8
Grand total	4,902·1	814·4	16·6	5,902·5	947·6	16·1	5,706·4	877·9	15·4	7,291·4	1,067·9	14·6

WHOLESALE PRICE INDEX NUMBERS

Little change in materials price index in September

THERE was little change in September in the price index for basic materials and fuel purchased by manufacturing industry, following the steep upward movement during the preceding three months.

There were a number of price changes in September, for example, increases for timber and cotton, and reductions for copper, maize and oilcake, but their combined effect was to increase the provisional index by less than ¼ per cent. Compared with 12 months before, the index was 38 per cent higher.

The provisional price index for manufactured products rose 1 per cent in September, the same as in each of the preceding four months. Prices of products of the food manufacturing industries rose 1½ per cent (mainly owing to increases for animal and poultry foods) which was half the rate in August. The recent tendency for the monthly rate of increase in prices of products of industries other than the food, drink and tobacco industries to become smaller was reversed in September when the provisional index rose 1 per cent against ¾ per cent in August.

Materials and fuel purchased by broad sectors of industry (Table 1)

There was some falling back in September in the index numbers for the food manufacturing and chemical industries, but index numbers for other sectors rose between ½ and 2 per cent. In the third quarter as a whole, in comparison with the second quarter, percentage increases were in double figures for five sectors (food, chemicals, electrical engineering, the timber and the paper industries). There was some speeding up in the rate of increase in index numbers for the steel industries, where the increase was 4½ per cent compared with one of 3½ per cent between the first and second quarters and for electrical machinery and construction materials, each of which showed a rise of 7 per cent compared with 5 per cent between the first and second quarters. Increases in the index numbers for the mechanical engineering industries and for clothing and footwear at about 5 per cent were about the same as the corresponding increases a quarter before.

Notes on Wholesale Price Index Numbers

(1) Detailed notes on index numbers of wholesale prices were last shown in *Trade and Industry* of June 21, 1973.

(2) The index numbers are constructed on a net sector basis. This is to say, the price movements used to compile the index for a particular sector of industry are only those relating to transactions between the sector and other sectors. Transactions between undertakings in the same sector are excluded. Thus index numbers for the whole of manufacturing industry are not weighted averages of sector index numbers.

(3) **Correspondence about wholesale price index numbers should be addressed to Statistics Division, DTI, Room 610, Sanctuary Buildings, Great Smith Street, London SW1P 3DB. Telephone inquiries for price index numbers should be made to 01-222 7877, Ext. 3549 (Engineering), 3509 (Chemicals, Steel, Building Materials, etc.), 3548 (Textiles, Clothing, Timber, Paper, etc.), 5844 (Imported Commodities) and 3411 for all other information.**

TABLE 1. PRICE INDEX NUMBERS OF MATERIALS PURCHASED **1970 = 100**

1968 SIC		1972		1973			1972	1973							
		3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr. p	Sept.	Feb.	Mar.	Apr.	May	June	July	Aug. p	Sept. p
	Materials and fuel purchased by manufacturing industry														
Orders III to XIX	Basic materials and fuel purchased by manufacturing industry:	109.4	115.6	126.0	133.4	149.9	110.7	126.0	129.4	130.5	132.4	137.3r	145.1	152.2	152.5
	Basic materials:	108.7	115.6	126.9	134.8	152.7	110.2	126.9	130.6	131.7	133.8	139.0	147.4	155.1	155.4
	ø Fuel	112.4	112.4	112.4	112.4	114.3	112.4	112.4	112.4	112.4	112.4	112.4	114.3	114.3	114.3
Orders IV to XIX	Basic materials and fuel purchased by manufacturing industry, other than food, drink and tobacco manufacturing industries	108.4	113.5	122.4	129.4	143.8	110.0	122.0	127.1	127.7	128.5	132.1	140.5	144.7	146.1
	Basic materials other than fuel	107.8	113.7	124.0	132.0	148.3	109.6	123.5	129.3	130.0	131.0	135.3r	144.6	149.4	150.9
	Materials and fuels purchased by Selected Broad Sectors of Industry														
211 to 229	Food manufacturing industries	112.1	119.6	130.5	138.4	155.3	113.1	131.3	131.4	133.7	137.5	143.9	149.1	159.5	157.4
Order V	Chemicals and allied industries	113.0	116.1	119.5	124.7	137.5	114.0	119.4	121.1	121.6	124.6	127.8r	134.5	139.2	138.7
311 to 312	Steel industries	115.1	117.1	118.1	122.0	127.6	115.6	118.0	118.7	119.9	122.6	123.4	126.9	127.6	128.1
Order VII (excluding MLH 342)	Mechanical engineering industries	113.9	115.2	116.9	122.3	128.3	114.2	116.7	118.0	118.5	123.3	125.2	127.4	128.4	129.2
Order IX	Electrical engineering industries	105.3	107.1	112.1	119.3	131.0	106.0	111.2	115.7	116.9	119.0	122.1	128.6	131.7	132.8
361	Electrical machinery industry	109.7	111.1	113.8	119.8	128.1	110.3	113.3	115.8	116.4	120.2	122.9	126.4	128.3	129.6
Order XIII	Textile industries	118.5	134.2	156.0	158.3	169.8	122.3	153.9	167.6	157.0	156.6	161.3	164.6	170.7	174.2
Order XV	Clothing and footwear industries	118.4	125.5	129.8	134.3	140.5	119.9	129.6	132.0	132.1	134.4	136.5	138.6	141.1	141.7
Order XVII	Timber industries	115.6	121.0	130.3 r	149.7	173.7	117.5	129.1	135.8 r	141.3	150.3	157.3	169.7	174.7	176.8
481 to 484	Paper industries	109.8	112.8	116.0	116.5	129.4	110.2	115.7	115.8	116.7	116.3	116.5	128.0	129.0	131.1
Order XX	Construction materials	117.4	121.0	124.5	131.0	140.4	118.3	124.1	126.2 r	128.0	131.1	133.9	138.7	140.7	141.9
Part of Order XX	House building materials	119.6	123.8	128.2 r	135.3	146.0	120.8	127.7	130.2 r	132.4	135.4	138.3	144.3	146.4	147.3

ø Coal (except for carbonising), gas and electricity. Crude oil and coal for carbonising are included in basic materials. r revised.

CHART 1

Manufacturing Industry (other than food, drink & tobacco)

the latest two months are provisional

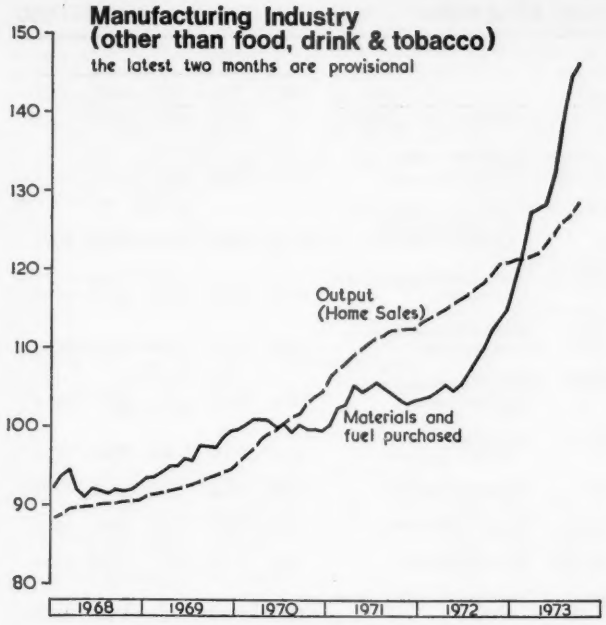
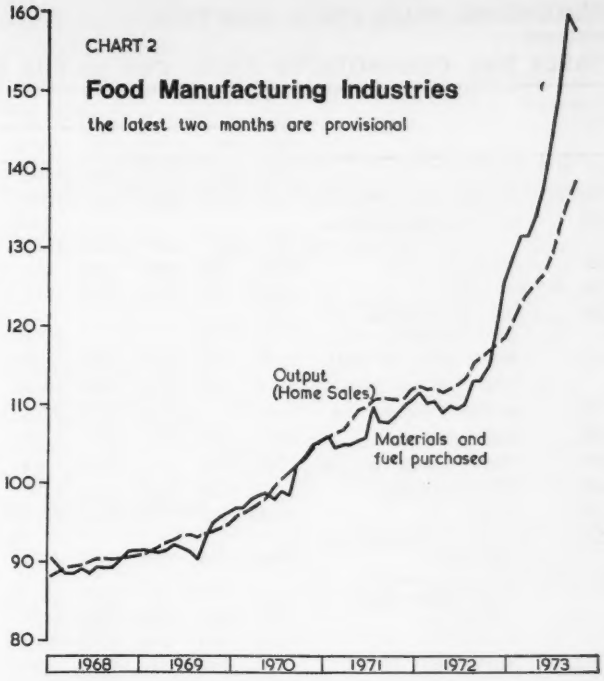


CHART 2

Food Manufacturing Industries

the latest two months are provisional



Output of broad sectors of industry: home sales (Table 2)

There was little change in the index for the steel industries in September, but index numbers for other sectors rose between ¾ per cent and 2¼ per cent. In the third quarter as a whole, increases compared with the second quarter varied from 2 per cent in chemicals, and clothing and footwear, to nearly 7 per cent for the food manufacturing and for the timber industries. There were substantial increases in the index numbers for the textile industries, 5 per cent above the second quarter, and for the paper industries, 4 per cent higher. The index for the steel industries was 3½ per cent higher than in the second quarter, and index numbers for the engineering groups were 2½ to 3 per cent higher. With the exception of steel, increases between the second and third quarters in index numbers for all these sectors were more than the corresponding increases a quarter before.

TABLE 2. PRICE INDEX NUMBERS OF OUTPUT (HOME SALES) 1970 = 100

1968 SIC		1972		1973			1972	1973							
		3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr. p	Sept.	Feb.	Mar.	Apr.	May	June	July	Aug. p	Sept. p
Orders III to XIX	Output of Manufactured Products	115.6	118.0	119.5	120.1	124.0	116.4	119.6	120.0†	118.8	120.1	121.3	122.7	123.9	125.3
Orders IV to XIX	Products of manufacturing industries other than food, drink and tobacco manufacturing industries:	117.7	120.4	121.4	123.5	127.1	118.5	121.4	121.7†	122.1	123.6	124.9	126.0	126.9	128.3
	Output of Selected Broad Sectors of Industry														
211 to 229	Products of the food manufacturing industries:	114.8	117.6	122.4	126.9	135.4	115.9	122.8	124.1	125.4	126.5	128.9	132.1	135.9	138.1
Order V	Chemicals and allied industries:	114.2	116.5	117.0	117.1	119.1	114.9	116.9	117.2†	116.9	117.1	117.2	118.3	119.1	120.0
311 and 312	Steel industries:	116.2	116.5	116.6	124.1	128.4	116.2	116.6	116.6	117.2	126.9	128.2	128.3	128.4	128.6
Orders VII to XII	Engineering and allied industries:	117.0	119.4	120.2	122.1	125.3	117.7	120.2	120.5†	120.8	122.0	123.4	124.3	125.1	126.6
Order VII (excluding MLH 342)	Mechanical engineering:	118.9	121.3	121.7	123.9	127.0	119.7	121.7	121.8	122.3	123.9	125.5	126.3	126.8	127.8
Order IX	Electrical engineering	114.1	115.1	115.7	117.0	120.3	114.6	115.6	116.0	116.4	116.9	118.3	119.0	120.1	121.9
Order XIII	Textile industries:	112.9	118.1	122.3	127.7	134.1	114.1	122.2	123.8	125.7	127.2	130.1	132.3	134.2	135.7
Order XV	Clothing and footwear:	114.1	116.9	118.1	119.9	122.5	114.9	118.0	118.5	118.9	120.1	120.8	121.4	122.1	124.1
Order XVII	Timber industries:	120.8	127.2	128.8	136.2	145.4	121.9	128.6	129.4	132.0	137.3	139.3	142.7	145.1	148.5
481 to 484	Paper industries:	114.6	116.8	117.8	119.7	124.7	115.5	117.9	118.1	118.4	119.7 r	121.1	123.1	124.7	126.4
Order XX	New construction‡	124	134	139	144 p				139			144 p			

‡ Index of building costs relate to average for the quarter. (*Department of the Environment*)

† Reductions in the VAT -exclusive prices of alcoholic liquor, tobacco and cigarettes, matches and mechanical lighters took place in April. These reductions resulted from lower revenue duties designed to offset additional tax revenue from VAT. With unchanged prices in April for these products, index numbers for months from April onwards would been have higher by the following:

All Manufactured Products: 1.7 points
Chemicals and Allied industries: 0.2 points
Other index numbers marked † less than 0.05 points

(continued on next page)

WHOLESALE PRICE INDEX NUMBERS

continued

TABLE 3(a). COMMODITIES PRODUCED IN THE UNITED KINGDOM 1970 = 100

1968 SIC		1972	1973			
		Aug.	May	June	July	Aug. p
101	Coal	128.5	128.1	128.1	135.6	135.6
102/1	Coated limestone roadstone	124.6	124.8	128.0	129.5	129.6
103	Sand and gravel—ex-pit or works	120.1	120.1	121.1	123.3	123.3
231	Beer†	111.2	93.9	93.8	93.8	93.8
240	Tobacco†	101.0	91.7	91.7	91.7	91.7
262	Motor spirit, Two star (including duty)	106.6	111.2	111.5	111.5	111.5
	Medium fuel oil (950 secs.)	129.9	133.7	133.7	133.7	133.7
	Derv fuel (including duty)	106.4	108.8	108.9	108.9	108.9
263	Lubricating oil and greases	121.0	131.3	134.9	137.5	137.5
271	General chemicals	110.2	112.4	112.8	114.1	115.4
272	Pharmaceutical preparations	110.5	110.4	111.1	111.6	112.4
273	Toilet preparations	120.0	123.3	123.5	124.3	125.1
274	Paint	123.4	124.6	126.2	126.2	126.5
276/1	Synthetic resins and plastics materials	103.6	103.6	103.6	105.4	105.7
311/2	Steel sheets—other than stainless and electrical sheets	116.5	132.0	132.0	132.0	132.1
	Tinplate	118.5	131.4	131.4	131.4	131.4
	Finished steel	115.3	127.0	127.6	127.6	127.7
	Steel sheet piling	119.4	132.4	132.4	132.5	132.6
	Heavy bars and sections	119.0	132.0	132.0	132.0	132.1
	Light re-rolled bars and sections	117.7	131.9	131.9	132.0	132.0
312	Steel tubes—other than electric conduit tubes	121.6	125.3	130.0	130.2	130.9
313/3 and 313/4	Iron castings	121.9	128.9	131.0	132.2	133.1
313/4	Cast and spun iron pipes and fittings	119.7	123.3	124.7	124.8	127.5
321	Aluminium: Rolled Extruded and drawn aluminium products—other than wire	112.4	115.5	115.5	118.3	119.3
	Aluminium: Castings	110.3	120.1	121.2	122.0	122.9
	Aluminium: Forgings	106.1	111.4	111.4	111.4	111.4
322	Brass ingots	76.6	106.0	111.3	122.4	127.8
331 ø	Agricultural machinery	118.6	126.2r	128.7	129.6	130.4
333	Pumps, valves, compressors, fluid power equipment	118.1	123.3	124.8	125.8	126.1
336	Construction and earth moving equipment	120.9	125.3	126.8	128.2	128.4
368	Domestic electrical appliances	114.1	113.7	113.8	115.2	115.5
391	Hand tools and implements	116.3	125.5	126.2	127.8	129.1
392	Cutlery and tableware	117.8	123.6	125.4	125.6	125.9
411	Man-made fibres production	104.1	104.2	105.1	106.3	106.3
412, 414/5 and 415	All spun man-made fibres, yarns	114.6	119.5	123.4	125.8	127.7
412	Cotton yarns, cotton-spun man-made fibre yarns and mixtures of both	116.8	127.1	131.3	138.6	149.6
413/1	Woven cotton cloth in the loomstate	119.2	128.3	131.6	137.0	143.5
413/5	Man-made fibres fabrics in the loomstate	116.2	125.8	130.3	132.6	133.9
414/2	Yarns of wool spun on the worsted system	127.6	185.4	189.5	193.4	195.9
417	Hosiery and other knitted goods	105.0	114.4	114.6	116.9	117.9
419	Carpets and rugs	112.5	126.5	131.0	132.5	132.6
431/1	Leather for footwear	150.9	160.2	159.4	158.2	158.2
441/449	Made-up clothing	112.5	117.3	117.7	118.3	118.9
450	Footwear—including rubber footwear	118.1	128.1	129.1	129.7	130.6
461/1	Refractory goods, including bricks	121.0	121.8	123.7	125.5	127.0
461/2	Non-refractory goods, including building bricks	127.9	132.9	133.7	137.1	137.2
	Engineering bricks—*delivered*	142.8	152.2	154.1	158.6	158.6
464	Cement—*delivered*	127.4	127.4	127.4	127.4	127.4
471/1	Hardwood—home grown	116.9	145.3	154.0	156.5	163.5
471/2	Building joinery	127.8	152.8	153.7	162.9	165.5
472	Domestic furniture	119.5	127.9	130.0	130.8	131.7
473	Bedding, etc.	121.7	128.7	131.2	132.4	133.2
481	Paper and board	110.7	115.6	116.3	122.0	124.3
482/1	Cardboard boxes, cartons and fibreboard packing cases	115.4	119.5	122.1	122.5	123.7
483	Manufactured stationery	118.8	124.5	125.7	126.5	128.3
484/1	Wallpaper	118.1	125.4	125.7	125.7	125.7
491/1	Rubber tyres and tubes	116.4	118.5	118.5	118.4	120.2
492	Linoleum and felt base	113.3	115.6	115.6	115.6	115.6

† Reductions in the VAT-exclusive price of beer and tobacco took place in April. This reduction resulted from lower revenue duties designed to offset additional tax revenue from VAT.

ø Revised figure for Agricultural machinery Jan '73 125.3 Feb '73 125.3 Mar '73 125.3 Apr '73 125.3

TABLE 3(b). COMMODITIES WHOLLY OR MAINLY IMPORTED INTO THE UNITED KINGDOM 1970 = 100

	1972	1973			
	Sept.	June	July	Aug.	Sept.
Hides and skins	215.5	202.8	200.1	220.3	206.1
Non-ferrous metals:					
Aluminium, virgin ingot delivered	86.0	91.5	97.7	97.7	97.7
Copper‡	73.6	114.8	135.0	143.6	135.3
Lead‡	97.8	130.5	146.1	139.7	144.8
Nickel refined delivered§	114.5	111.6	109.6	111.2	114.0
Tin, ingot min. 99.75%‡	101.7	115.1	127.6	132.4	135.1
Zinc‡	121.7	206.7	269.6	300.5	326.3
Imported zinc§	125.1	155.2	168.2	171.9	179.0
Natural Rubber	81.9	158.3	197.7	196.1 p	183.5p
Sulphur, crude, cif (for acid making)	89.0	100.2	96.7	96.7	96.7
Textiles:					
Cotton, raw	106.2	162.7	204.8	246.6	288.2
Wool, raw	172.5	327.4	316.6	326.7	323.1 p
Timber:					
Imported hardwood (ex-yard or wharf)	127.7	196.8	201.7	211.9p	221.0 p
Imported plywood (delivered to consumers)	121.1	167.0	178.5	183.9	188.0 p
Imported softwood (delivered to consumers)	116.1	185.0	212.3	220.6	230.0 p
Woodpulp, imported	105.4	109.1	135.4	135.1	138.5

‡ LME settlement price. § Producer's price.

Index numbers of wholesale prices

The index numbers of wholesale prices relating to 1970 = 100 supersede those previously published on the base 1963 = 100. For the convenience of those who use the index numbers in long-term contracts to take account of changes in the costs of materials, the DTI will continue to publish indices relating to materials used in broad sectors of industry on the base 1963 = 100 until December 1975. From April 1973 the index numbers in the accompanying table have been given the month to month movements of the equivalent index in the 1970 = 100 Series. For users of other 1963 based index numbers who wish to continue the series in this way, multiplication factors will be provided on request.

Price index numbers of materials purchased

1963 = 100

1968 SIC		1973		
		July	Aug. p	Sept. p
Orders III to XIX	Basic materials and fuel purchased by manufacturing industry:†	190.0	199.3	199.7
	Basic materials	195.1	205.3	205.7
	Fuel	151.7	151.7	151.7
Orders IV to XIX	Basic materials and fuel purchased by manufacturing industry, other than food, drink and tobacco manufacturing industries	190.5	196.2	198.1
	Basic materials other than fuel●	198.6	205.2	207.3
211 to 229	Food manufacturing industries	186.0	198.9	196.3
Order V	Chemicals and allied industries‡	165.6	171.4	170.7
311 to 312	Steel industries	160.5	161.3	161.9
Order VII (excluding MHL 342)	Mechanical engineering industries	174.0	175.4	176.5
Order IX	Electrical engineering industries	198.1	202.8	204.5
361	Electrical machinery industry	186.6	189.4	191.4
Order XIII	Textile industries	187.2	194.1	198.1
Order XV	Clothing and footwear industries	168.9	171.9	172.7
Order XVII	Timber industries	228.3	235.1	237.9
481 to 484	Paper industries	169.2	170.6	173.3
Order XX	Construction materials	182.8	185.5	187.1
Part of Order XX	House building materials	191.5	194.3	195.5

† Revised index number June 1973 = 179.7
● Revised index number June 1973 = 185.9
‡ Revised index number June 1973 = 157.3

Vehicle production in September—provisional estimates

VEHICLE production for the United Kingdom estimated from provisional returns supplied by the major manufacturers is as follows:

TABLE 1. ESTIMATED VEHICLE PRODUCTION FOR THE FIVE WEEK PERIOD ENDING SEPTEMBER 29, 1973

	Number Cars		Number Commercial vehicles	
	Period	Weekly average	Period	Weekly average
Estimated output for September 1973	131,000	26,200	38,500	7,700
Output for September 1972	175,847	35,169	36,391	7,728
Percentage change on 1972		−26		+6

TABLE 2. VEHICLE PRODUCTION IN SEASONALLY ADJUSTED TERMS

	Monthly averages Thousands Cars	Commercial vehicles
1972 2nd quarter	157	34.5
3rd quarter	159	32.4
4th quarter	180	39.9
1973 1st quarter	144	32.5
2nd quarter	137	34.1
3rd quarter	146	36.7
July	153	41.8
August	159	33.0
September (estimate)	126	34.6
Average for: last 3 months	146	36.7
preceding 3 months	137	34.1
Percentage change	+6	+7

Cinema admissions and takings in July

DURING July, counted as a 4 week period, the weekly average of admissions to cinemas in Great Britain was 2.86 million and the weekly average of gross box office takings including V.A.T. was £1.26 million. The comparable figures for July 1972 were 3.15 million and £1.13 million respectively.

Registrations of British, Community and foreign films

The following are details of films registered by the Department of Trade and Industry under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, October 12, 1973.
BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered No.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
Review No. 2—27th Year	BR/E 37068/14/10/78	10	October 10	Data Film Distributors Ltd.	National Coal Board
Snow White And The Seven Perverts	BR/E 37078/14/10/78	11	October 10	New Realm Distributors Ltd.	Oppidan Film Productions Ltd.
Artistry In Tureens	BR/E 37083/14/10/78	22	October 11	Cinema International Corporation (UK)	Charles Barker Films Ltd.
Movietone News 2314	BR/E 37028/14/10/78	8	October 12	British Movietonews Ltd.	British Movietonews Ltd.
Movietone News 2314A	BR/E 37029/14/10/78	7	October 12	British Movietonews Ltd.	British Movietonews Ltd.
			COMMUNITY		
Blood Wedding (Les Noces Rouges)	EC 37075/14/10/78	96	October 10	Connoisseur Films Ltd.	Films La Boetie, Paris and Canaria Film, Rome
Roman Scandals '73	EC 37077/14/10/78	91	October 10	Gala Film Distributors Ltd.	Capitolina Produzioni Cinematografiche, Rome
Attraction	EC 37079/14/10/78	59	October 10	Columbia-Warner Distributors Ltd.	Lion Film, Rome
			FOREIGN		
Wonder Women	F 37069	80	October 10	Target International Pictures Ltd.	General Film Corporation
Cahill	F 37070	102	October 10	Columbia-Warner Distributors Ltd.	Batjac Productions Inc.
Sex Is The Name Of The Game	F 37071	93	October 10	Columbia-Warner Distributors Ltd.	S.I.F.A., Buenos Aires
Hero Bunker	F 37072	95	October 10	Cathay Films Ltd.	Carayannis Carajopoulos SA, Athens
Harry In Your Pocket	F 37073	103	October 10	United Artists Corporation Ltd.	Bruce Geller Productions Inc.
White Lightning	F 37074	101	October 10	United Artists Corporation Ltd.	Levy-Gardner-Laven Productions Inc.
The Nailclippers (Pince A' Ongles)	F 37076	12	October 10	Connoisseur Films Ltd.	C.A.P.A.C., Paris
The Adventures Of Barry McKenzie	F 37080	106	October 11	Columbia-Warner Distributors Ltd.	Longford Productions Pty. Ltd., Sydney
Massage Parlour	F 37081	77	October 11	Hemdale Film Distributors Ltd.	Transatlantik Filmproduktion GmbH & Co. Kg., Munich
Blue Movie Blackmail	F 37082	97	October 11	Hemdale Film Distributors Ltd.	Italian International Film SRL, Rome, Clodio Cinemagrafica, Rome and Monymusk Productions Ltd., London

TEXTILES

Made-up clothing: orders and deliveries

In the three months ended June 1973 net new orders received by the clothing industry were provisionally estimated to be 1 per cent lower than in the three months ended March 1973; deliveries were 6 per cent higher. Orders on hand at the end of June were 9 per cent higher than at the end of March.

These comparisons are based on the seasonally adjusted series in the accompanying table.

MADE-UP CLOTHING

Index numbers of the volume of total orders and deliveries

	Orders-on-hand (end period)	Net new orders	Deliveries
	December 1962 = 100	Average 1963 Deliveries = 100	Average 1963 Deliveries = 100
1963	107	101	100
1964	112	104	104
1965	137	112	109
1966	114	106	109
1967	124	107	105
1968	148	110	107
1969	143	107	107
1970	155	112	111
1971	184	120	116
1972	194	122	121

	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1971 1st quarter	153	169	118	121	119	116
2nd quarter	184	183	130	123	113	116
3rd quarter	161	176	102	112	115	116
4th quarter	184	184	131	121	118	118
1972 1st quarter	169	181	111	116	119	118
2nd quarter	194	190	131	123	117	118
3rd quarter	178	199	112	126	120	121
4th quarter	194	194	135	123	126	126
1973 1st quarter	214 r	232 r	135	140 r	123	119
2nd quarter p	253	254	143	138	122	126
1971 November	185	180	153	123	124	117
December	184	184	96	123	99	117
1972 January	179	179	102	116	110	124
February	173	179	109	110	118	110
March	169	181	122	122	128	119
April	174	187	131	130	122	120
May	202	199	159	138	113	118
June	194	190	103	102	115	116
July	179	180	93	106	118	123
August	183	200	113	152	108	120
September	178	199	129	119	136	120
October	192	204	163	136	141	126
November	209	206	161	130	134	127
December	194	194	79	103	104	124
1973 January	204	210	124	144	106	117
February	205 r	220 r	133 r	141 r	132	124
March	214 r	232 r	146	135	131	116
April	225 r	244 r	145	150	126	129
May	245 r	243 r	149 r	121	117	123
June p	253	254	135	144	123	125

Wholesale houses' sales

Sales by wholesale textile houses in August showed an increase of 9 per cent on a year earlier, compared with increases of 14 per cent in June and 5 per cent in July.

The value of stocks at the end of August was 19 per cent higher than a year earlier.

TABLE 1. TOTAL SALES AND STOCKS

Index numbers and *percentage increase compared with a year earlier* 1950 = 100

	Value of home sales		Value of stocks end period	
1966	110	*–3*	..	..
1967	104	*–5*	..	..
1968	108	*4*	..	..
1969	103	*–5*	..	..
1970	107	*4*	..	..
1971	115	*8*	..	..
1972	121	*5*	..	..
1971 3rd quarter	115	*9*	148	*1*
4th quarter	140	*4*	152	*6*
1972 1st quarter	102	*2*	164	*11*
2nd quarter	111	*4*	146	*8*
3rd quarter	123	*7*	154	*4*
4th quarter	149	*6*	169	*12*
1973 1st quarter	120	*18*	184	*12*
2nd quarter	123	*11*	171	*17*
1972 August	114	*4*	150	*6*
September	154	*6*	154	*4*
October	165	*6*	140	*1*
November	137	*4*	187	*8*
December	145	*8*	169	*12*
1973 January	87	*22*	162	*6*
February	126	*22*	169	*5*
March	146	*13*	184	*12*
April	133	*10*	163	*11*
May	114	*9*	173	*15*
June	121	*14*	171	*17*
July	107	*5*	173	*15*
August	124	*9*	179	*19*

TABLE 2. ANALYSIS BY DEPARTMENT

Percentage increase compared with a year earlier

	Sales		Stocks(‡)
	August 1973	January-August 1973	August 1973
Women's knitted outerwear, blouses and skirts	15	–1	7
Women's coats, costumes, furs and raincoats	9	10	15
Women's underwear	–4	10	–6
Women's hose and children's socks	–5	–14	6
Women's millinery	–4	–	73
Haberdashery, ribbons and wool	10	5	24
Children's wear	5	–8	–4
Men's and boys' shirts, pyjamas and outfitting	13	18	–6
Gloves	116	29	–20
Piece-goods and nets	–	4	60
Household textiles	42	36	63
Floor coverings, furniture and hardware	9	18	48
Boots and shoes	–	5	36
Total†	9	12	19

† including some items not included among the sub-headings.
‡ Values at cost.

Notes

These statistics are prepared by Textile Distributors' Association. Inquiries should be addressed to the Secretary, The Textile Distributors' Association, 3 Berners Street, London W1P 4JP (Tel. 01-580 2902).

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Monthly statistics of metal-working machine tools

THIS article introduces a new series of monthly machine tool statistics that are to be published regularly in Business Monitor PM332, succeeding those previously published in the monthly edition of P64. The first issue of the new monthly monitor will give figures up to June of this year, together with a commentary on the figures and a fuller description of the way in which they are compiled.

The new statistics are derived from the new monthly engineering inquiry details of which are described in Business Monitor P113 (now entitled PM33-36) and in an article in *Economic Trends* for April 1972. They have been grossed-up to be consistent with the more comprehensive statistics for machine tools published quarterly in Business Monitor P64 (now to be renumbered PQ332), and in this journal, in such a way as to maintain the monthly movements as far as possible.

The statistics relate to metal cutting and forming (including numerically controlled) machine tools manufactured in establishments in the United Kingdom employing 25 or more persons but exclude physico/chemical process machine tools since the full information for this sector is not available in the quarterly business monitor. The coverage of the new series differs from its predecessors partly because of a change in the basis of recording, from deliveries to sales, but mainly because of the inclusion of the data from additional firms.

In the new quarterly inquiry for this industry information is collected on new orders received, net of cancellations, as well as sales. Sales, for this purpose, mean deliveries on sale and do not include forward sales (contracted but unshipped). Orders-on-hand are not collected but changes in the level of orders outstanding are derived as the difference between sales and new orders in the quarter. These implied changes in the level of the order book are related cumulatively to the level of orders-on-hand at the end of 1971 as estimated from the earlier inquiries. The movements in orders outstanding so derived will be regularly checked against the movements shown by the sample in the monthly engineering inquiry and the necessary steps will be taken to ensure consistency.

Annual figures back to 1966 have also been revised to be consistent as far as possible with the new quarterly inquiry results, and total sales of machine tools are also generally comparable with the 1968 Census of Production. Although the monthly statistics for the last quarter of 1972 and more especially for 1973 are provisional and subject to revision in the light of the quarterly results as they become available, experience so far indicates, as reported in this journal on August 9, 1973, that the monthly estimates give early but generally representative measures of the changes shown by the more complete quarterly statistics.

Commentary

The latest monthly statistics of metal-working machine tools now available up to June 1973 show that the strong upturn in activity which had been reported up to the end of February this year has been maintained. At current prices, total sales in the first half of 1973 were 17 per cent higher than in the previous half year and 24 per cent more than in the first half of 1972. Higher prices contributed to these increases but the greater part of the growth has been in the volume of sales. Within the first six months of this year export sales have increased markedly with a 10 per cent rise between the first and second quarters. Home sales, which had risen very sharply by over 20 per cent in the first quarter, when the £16 million of Government orders were probably still having an effect, fell back in the second quarter of 1973 but were still significantly greater than in any quarter of 1972.

New orders have continued to grow strongly with the most recent expansion in new export orders. Total new orders were 13 per cent higher in the second quarter of 1973 than in the previous quarter, entirely in consequence of a very sharp rise in export orders, and nearly 90 per cent higher than a year earlier. New orders for home and export markets in the second quarter were flowing in at rates over 80 per cent and nearly 100 per cent higher respectively than in the second quarter of last year.

With the intake of new orders very greatly exceeding sales, the levels of orders-on-hand in both home and export sectors have been rising rapidly in the latest months. Order books for total, home and export markets at the end of June 1973 as a result were respectively over 50, 80 and 30 per cent higher at current values than at the end of June 1972, but had not yet reached the high levels of orders-on-hand recorded at the ends of 1969 and 1970.

METAL-WORKING MACHINE TOOLS: ORDERS AND SALES

	Sales			Orders outstanding			New orders		
	Total	Home	Export	Total	Home	Export	Total	Home	Export
1966	164.0	118.9	45.1	110.7	78.0	32.7	160.1	114.1	46.0
1967	171.2	123.9	47.3	100.9	54.1	46.8	161.4	100.0	61.4
1968	168.6	113.5	55.1	116.1	61.7	54.4	183.8	121.1	62.7
1969	189.1	119.1	70.0	164.2	93.3	70.9	237.2	150.7	86.5
1970	218.6	137.3	81.3	159.5	86.8	72.7	213.9	130.8	83.1
1971	207.7	121.7	86.0	106.0	46.0	60.0	154.2	80.9	73.3
1972	180.6	109.9	70.7	114.5	55.2	59.3	189.1	119.1	70.0
1972 1st quarter	45.6	27.6	18.0	98.4	40.4	58.0	38.0	22.0	16.0
2nd quarter	42.1	24.4	17.7	96.2	40.4	55.8	39.9	24.4	15.5
3rd quarter	43.6	27.2	16.4	108.0	49.7	58.3	55.4	36.5	18.9
4th quarter	49.3	30.6	18.7	114.5	55.2	59.3	55.8	36.1	19.7
1973 1st quarter	56.4	37.8	18.6	124.5	61.8	62.7	66.4	44.4	22.0
2nd quarter	52.7	32.2	20.5	146.9	74.0	72.9	75.1	44.4	30.7
1972 January	14.4	8.9	5.5	104.9	46.0	58.9	13.3	8.9	4.4
February	12.4	7.2	5.2	104.7	44.6	60.1	12.2	5.8	6.4
March	18.8	11.5	7.3	98.4	40.4	58.0	12.5	7.3	5.2
April	13.3	7.7	5.6	98.9	40.6	58.3	13.8	7.9	5.9
May	13.2	7.3	5.9	95.5	40.9	54.6	9.8	7.6	2.2
June	15.6	9.4	6.2	96.2	40.4	55.8	16.3	8.9	7.4
July	13.8	8.6	5.2	98.0	44.0	54.0	15.6	12.2	3.4
August	13.7	9.0	4.7	105.2	45.5	59.7	20.9	10.5	10.4
September	16.1	9.6	6.5	108.0	49.7	58.3	18.9	13.8	5.1
October	15.8	9.9	5.9	111.2	50.4	60.8	19.0	10.6	8.4
November	19.4	12.1	7.3	109.5	49.8	59.7	17.7	11.5	6.2
December	14.1	8.6	5.5	114.5	55.2	59.3	19.1	14.0	5.1
1973 January	17.1	11.7	5.4	117.2	58.3	58.9	19.8	14.8	5.0
February	18.9	12.7	6.2	119.0	57.5	61.5	20.7	11.9	8.8
March	20.4	13.4	7.0	124.5	61.8	62.7	25.9	17.7	8.2
April	15.6	9.1	6.5	131.8	65.3	66.5	22.9	12.6	10.3
May	17.6	11.4	6.2	137.7	68.4	69.3	23.5	14.5	9.0
June	19.5	11.7	7.8	146.9	74.0	72.9	28.7	17.3	11.4
Percentage change on:									
1. First quarter 1973	−7	−15	+10	+18	+20	+16	+13	−	+71
2. On a year earlier	+25	+32	+16	+53	+83	+31	+88	+82	+98

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Exceptionally copies can be purchased over the counter at either the Department of Trade and Industry Central Library, 1 Victoria Street, London SW1H 0ET, or at the Department's Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4M 7HU. Copies of specific issues (including back issues) can be ordered by post (payable in advance) from the Department's Central Library, which will supply prices on request (tel: 01-222 7877, ext. 3038).

A complete list of titles of Business Monitors is available on application to Department of Trade and Industry, Room 306, Gaywood House, Great Peter Street, London SW1P 3LW.

Customs notices of interest to exporters

THE following Public Notices issued by HM Customs and Excise relate to various aspects of export procedure. Copies of these Notices may be obtained from the local Officer of Customs and Excise, whose address appears in the telephone directory and to whom all inquiries should be addressed, or from the Secretary, HM Customs and Excise, 39-41 Mark Lane, London, EC3R 7HE.

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Guide to DTI	Aug. 30 1973
Official Receivers' offices	Oct. 11 1973
Programme of trade promotions	This week
Release dates of economic statistics	Sept. 27 1973

MISCELLANEOUS ADVERTISEMENTS

30p per line, minimum £1.50 payable in advance Box No. 50p
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GOVERNMENT SALES

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October 24, 1973 Miscellaneous

Location: Regional Depot RAOC, Moreton-on-Lugg, Hereford HR4 8DS

Auctioneers: Russell Baldwin & Bright (Dept. L), 20/21 King Street, Hereford HR4 9DB (Tel: 0432-55441)

The lots include 10 Vehicles, 8 Power Jack trucks, 14 Compressors, Machine Tools, Trailers, Tyres, Radiator cores, 15,500 Aircraft switches, 500 Brake units, Electronic valves, Radio receivers, Aircraft-Wireless-MT and Electrical spares, Oscilloscopes, Binoculars, Periscopes, Wrist watches, Rock breakers, Forges, Lubricating plants, Clothing, Blankets, Furniture and a large collection of other miscellaneous stores.

October 31, 1973 Miscellaneous Stores

Location: Auctioneer's Premises

Auctioneers: Woolland Son & Manico (Dept. L), Kinterbury House, St. Andrew's Cross, Plymouth PL1 2DQ (Tel: 0752-69292)

Clothing including Greatcoats, Duffel coats, Overalls, Jerkins etc. Mixed rags, tentage and other textiles, Binoculars, Telescopes, Barometers, Barographs, Photographic equipment, Telephones and Electrical spares, Electric Fires, Irons, Kettles, Fans and Sewing machines Test meters and Test sets, Thermometers, Gauges, Oscilloscopes and Solarscopes, Chain blocks and Tackle, Gravity runway curves, Aluminium fuel tanks (450 gal), Portable generators etc., 1 ton crane, Coles 6 ton crane, two Ford vans and 13 motor cycles, a large quantity of furniture and Kitchen equipment and other miscellaneous stores.

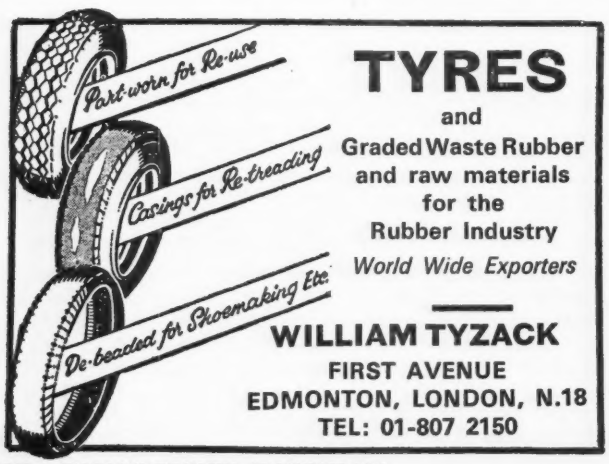
November 6, 1973 Miscellaneous Stores

Location: Central Ordnance Depot, Bicester, Oxon

Auctioneers: Midland Marts Ltd., (Dept. L), Market Square, Bicester, Oxon (Tel: 08692-2073)

Clothing and textiles including Greatcoats, Vests, Jersey Pullovers, Trousers Liners, Gurkha White Jackets, Trousers and Shorts, Raincoats, Trousers, Blankets, Buttons, Bootlaces, Carpets, Rags, etc. Furniture including Chairs, Tables, Wardrobes, Dressing Chests, Sideboards Lockers, Writing Bureaux, Kitchen Equipment, etc. Vehicles and Machines including Ford Zephyr Saloon, Morris 1000 Car, Land Rover, Ford 31 Seater Coach, 8 Minibuses and Light Buses, 4 Ford Vans, Bedford Tipper, Commer Pick-up Truck, Bedford QL refuellers, Eagle Trailers, Tank Transporter Trailer, Fork Lift trucks, Gardner 6L3 Diesel Engines, Trailer Fire Pumps, Milling machines, Centre and Capstan Lathes, Universal Woodworking Machine, Drilling Machines, Mortising Machine, Planning Machine, Compressors, Water Pumps etc. Several lots of Electrical Equipment which include Tape Recorders, Tuning units, Receiver Sets, Charging Sets, Electric Cable and Sleeving, etc. Large quantity of Canvas Tent Sections, tent valises, Covers, Tent Poles and Pins, Sleeping Bags, Groundsheets, Tarpaulins, Tyres, M.T. Spares, Pallet Transporting Trucks, Vices, Jacks, Chain Pipe Wrenches, Hand Tools, Cameras, Wristwatches.
and a large quantity of miscellaneous items.

Catalogues of the above sales, which give details of the lots, conditions of sale, viewing times etc. are available from the relevant auctioneers from two weeks prior to and up to the date of the sale, Price 10p (postal order only).



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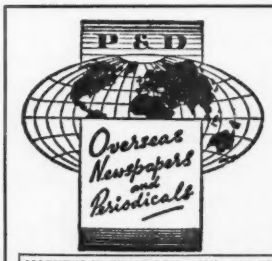

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